



2022

15TH ANNUAL CEO FORUM SCHEDULE

mon-wed, mar 7-9, 2022 | westin kierland | scottsdale, az

MON
MAR 7

TUE
MAR 8

WED
MAR 9

7:00	
7:30	Pre-scheduled one-on-one's
8:00	
8:30	
9:00	
9:30	
10:00	
10:30	New Attendee Meet & Greet
11:00	
11:30	Welcome Lunch & Remarks
12:00	Lunch/Icebreaker Tables
12:30	
1:00	Break
1:30	General Session I KEEPING YOUR HEAD WHILE SOCIETY ADAPTS: AN A/E FIRM FORECAST FOR THE NEW "ROARING 20s" <i>Rainmakers Ballroom</i>
2:00	
2:30	
3:00	Break
3:30	Roundtable Discussions: (choose one) • Keeping Your Head While Society Adapts <i>Mapmakers</i> • Mobilizing a Competitive Workforce <i>Sitgreaves Suite</i> • Cyber Security in a Mobile/Hybrid Workforce <i>Whipple Suite</i>
4:00	
4:30	
5:00	End of Monday Sessions
5:30	Cocktails & Dinner at Brittlebush at <i>The Westin Kierland</i>
6:00	
6:30	
7:00	
7:30	
8:00	
8:30	

Breakfast
Roundtable Discussions: (choose one) • Mobilizing a Competitive Workforce <i>Mapmakers</i> • The New Rules of Developing Business <i>Sitgreaves Suite</i> • Good Board or GREAT Board? <i>Whipple Suite</i>
Break
Roundtable Discussions: (choose one) • The New Rules of Developing Business <i>Mapmakers</i> • Cyber Security in a Mobile/Hybrid Workforce <i>Sitgreaves Suite</i> • How Buyers and Sellers Assess Culture in M&A Activities <i>Whipple Suite</i>
Lunch
General Session II DIVERSITY, EQUITY, & INCLUSION (DEI) PROGRAMS WITH TEETH <i>Rainmakers Ballroom</i>
Break
Roundtable Discussions: (choose one) • How Buyers and Sellers Assess Culture in M&A Activities <i>Mapmakers</i> • Good Board or GREAT Board? <i>Sitgreaves Suite</i> • Building an Impactful JEDI/DEI Program <i>Whipple Suite</i>
Break
Pre-scheduled one-on-one's
End of Tuesday Sessions
Cocktails & Entertainment <i>Tommy Bahama</i>
Dinner <i>Tommy Bahama</i>

Breakfast
General Session III EVOLVING PRIVATE EQUITY TRENDS IMPACTING THE A/E/C DEAL MARKET <i>Rainmakers Ballroom</i>
Break
General Session IV ADVISOR DODGEBALL <i>Rainmakers Ballroom</i>
Boxed Lunch – End of Wednesday Sessions & the Forum
Golfers Head Out



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GENERAL SESSIONS

KEEPING YOUR HEAD WHILE SOCIETY ADAPTS: AN A/E FIRM FORECAST FOR THE NEW "ROARING 20s"

Laurie Dreyer, Chief Development Officer, Taylor Design

Jerry Guerra, Founder, The JAGG Group

This is a broad-ranging examination of industry trends and workplace practices. There will be a single breakout as follow-up for folks who want to discuss the effects of the pandemic on the workplace.

DIVERSITY, EQUITY, & INCLUSION (DEI) PROGRAMS WITH TEETH

Shannon Hayes, PHR, Director of HR, The Timmons Group

Barbara Irwin, Founder and CEO of HR Advisors Group

Nabil Rashed, Sr. Project Engineer, BKF Engineers

Zach Siviglia, President and CEO, Mark Thomas

The last several years have seen industry firms increasing their efforts to promote employee "diversity, equity, and inclusion." These efforts range from taking a hard look at hiring and advancement practices to creating new corporate functions to overhaul and oversee workplace protocols. What differentiates the initiatives showing slight improvements from those resulting in impactful cultural shifts?

This panel of executive and Human Resources professionals will explore the steps and pitfalls involved in creating a program, establishing goals and progress measurements, identifying key players and their roles, and effectively communicating programs and activities to employees.

EVOLVING PRIVATE EQUITY TRENDS IMPACTING THE A/E/C DEAL MARKET

David Cohen, Managing Director, Matheson Financial Advisors

Kevin Haney, Colliers Engineering and Design

Brian Kisiel, Geolnsight, Inc.

This general session will demystify private equity groups' ("PEGs") and family offices' attraction to the AEC space, identify the business characteristics these financial buyers find most attractive in their acquisition targets, and cover what to expect when negotiating deal terms. Ultimately, this session will seek to answer the questions, "What does it mean to bring a PEG or family office into your firm's ownership, and how to successfully align interests between a financial partner and your key leadership?"

ADVISOR DODGEBALL

David Cohen, Managing Director, Matheson Financial Advisors

Rich Friedman, President, Friedman & Partners

Matt Gough, President, Ames & Gough

Barbara Irwin, Founder and CEO, HR Advisors Group

Kathryn Sprankle, Founder, Sprankle Leadership

Back by popular demand! Don't miss our closing general session and the opportunity to throw at the experts your pressing questions. 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.



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ROUNDTABLE DISCUSSIONS

KEEPING YOUR HEAD WHILE SOCIETY ADAPTS: AN A/E FIRM FORECAST FOR THE NEW "ROARING 20s"

Laurie Dreyer, Chief Development Officer, Taylor Design

Jerry Guerra, Founder, The JAGG Group

This is a broad-ranging examination of industry trends and workplace practices for folks who want to discuss the effects of the pandemic on the workplace.

MOBILIZING A COMPETITIVE WORKFORCE

Rich Friedman, Barbara Irwin, Kathryn Sprankle

Retiring Boomers, the Great Resignation, and ever-shifting workplace trends have combined to constrain firms' productivity and growth opportunities. Besides competing in the hottest recruitment market we've seen in decades, what initiatives are we employing to bolster the development of our existing workforce? How are we addressing the voids left by departing leadership?

CYBER SECURITY IN A MOBILE/HYBRID WORKFORCE

Matt Gough, President, Ames & Gough

While hybrid work models can offer various benefits to both employers and their workforces, these arrangements also carry unique cybersecurity risks. This session will discuss the best practices to help minimize cybersecurity exposures for the hybrid work model.

THE NEW RULES OF DEVELOPING BUSINESS

Rich Friedman, President, Friedman & Partners

Forward-thinking A/E and environmental consulting firms are institutionalizing the best of the changes that the COVID-19 pandemic forced on the business world and our industry. How has your firm effectively adapted its marketing and business development strategy to align with the realities of the current and post-COVID market? Among the topics we'll discuss in this interactive breakout session are:

- New opportunities and services (What new client pain points/needs have you uncovered? How have you met these needs?)
- Shifting messaging (How do we grab clients' attention without seeming tone deaf?)
- The shift to paperless marketing (Do we even know where to send snail mail?)
- Relationship-building by video (Which aspects will stick and which will revert back when/if Covid-19 shifts to an endemic?)
- How best to establish and build relationships in virtual meetings/conferences?
- How do we use virtual meetings to deliver client service that leads to repeat work?

HOW BUYERS AND SELLERS ASSESS CULTURE IN M&A ACTIVITIES

David Cohen, Managing Director, Matheson Financial Advisors

When pursuing mergers and acquisitions, it is imperative to understand the cultural compatibility between the two firms as early as possible as part of the go/no-go decision. But what is culture, and how can you tell if there is a match in

only a few meetings? Culture is more than norms and how employees relate and interact with each other and their community—it also reflects management practices and how the firm does things. What are different ways to view and define culture and compatibility so management can make quicker and more accurate go/no go decisions and design better integration plans based on cultural assessments and early warning filters?

GOOD BOARD OR GREAT BOARD?

Kathryn Sprankle, Founder, Sprankle Leadership

What's the difference between a good board of directors and a great one? How does a board become truly impactful and best serve a company's shareholders? What strategic priorities should boards be addressing right now in this era of Big Change? How are criteria for director nomination and election established? Join this discussion in which we'll compare the group's varied approaches to corporate governance and their expectations of their boards of directors.

BUILDING AN IMPACTFUL JEDI/DEI PROGRAM

Barbara Irwin, Founder and CEO, HR Advisors Group

A follow up to the general session, this roundtable will explore the steps and pitfalls involved in creating a program, establishing goals and progress measurements, identifying key players and their roles, and effectively communicating programs and activities to employees.