



A|E Advisors
ANNUAL
CEO
FORUM

17th Annual CEO Forum
February 12 & 13, 2024

The Lodge at Torrey Pines
La Jolla, California

SCHEDULE

Sunday, February 11

2:30 – 7:00 PM Superbowl 2024 LVIII Welcome Party
(Hennesseys Tavern, 7811 Herschel Ave., La Jolla, CA)

Monday, February 12

7:30 – 8:45 AM Breakfast & Networking (Charles Fries Room)

8:45 – 9:00 AM Welcome Remarks (Charles Reiffel Room)

9:00 – 10:30 AM Opening Keynote:
Neil Leach, Professor, Florida Atlantic University
AI and the Future of the A/E Industry
(Charles Reiffel Room)

10:30 – 11:00 AM Break & Networking

11:00 AM – 12:15 PM Breakout Session A

- Keynote Breakout (Maurice Braun I Room)
- Aligning Purpose and Strategy (Maurice Braun II Room)
- Private Equity's Position in M&A (Maurice Braun III Room)

12:15 – 1:00 PM Lunch (Charles Fries Room)

1:00 – 1:15 PM Break

1:15 – 2:15 PM Main Session Panel:
Change Leadership: Stories from the Front Lines
(Charles Reiffel Room)

2:15 – 2:45 PM Break & Networking

2:45 – 4:00 PM Breakout Session B

- Keynote Breakout (Maurice Braun I Room)
- Forming and Optimizing Your Board of Directors (Maurice Braun II Room)
- Your Future 'People Strategy': Recruiting and Leadership Development (Maurice Braun III Room)

4:00 – 4:15 PM Break

4:15 – 5:15 PM Breakout Session C

- Connecting with Four Generations in a Hybrid Workplace (Maurice Braun I Room)
- Marketing and Business Development Leadership (Maurice Braun II Room)
- 2024 Emerging Risk Trends Affecting A/E Firms (Maurice Braun III Room)

SCHEDULE, CONT.

5:30 – 6:30 PM	Cocktails (<i>Charles Fries Room</i>)
6:30 PM	Dinner (<i>Charles Reiffel Room</i>)

Tuesday, February 13

7:30 – 9:00 AM	Breakfast & Networking (<i>Charles Fries Room</i>)
9:00 – 10:00 AM	Main Session Panel: Recruitment/People Strategy in a Hybrid Workplace (<i>Charles Reiffel Room</i>)
10:00 – 10:30 AM	Break & Networking
10:30 – 11:45 AM	Breakout Session D <ul style="list-style-type: none">▪ Compensation Strategy (<i>Maurice Braun I Room</i>)▪ Aligning Purpose and Strategy (<i>Maurice Braun II Room</i>)▪ 2024 Emerging Risk Trends Affecting A/E Firms (<i>Maurice Braun III Room</i>)
11:45 AM – 12:30 PM	Lunch (<i>Charles Fries</i>)
12:30 – 12:45 PM	Break
12:45 – 2:00 PM	Breakout Session E <ul style="list-style-type: none">▪ Your Future ‘People Strategy:’ Recruiting and Leadership Development (<i>Maurice Braun I Room</i>)▪ New CEOs (<i>Maurice Braun II Room</i>)▪ Private Equity’s Position in M&A (<i>Maurice Braun III Room</i>)
2:00 – 2:30 PM	Break & Networking
2:30 – 3:45 PM	Breakout Session F <ul style="list-style-type: none">▪ Compensation Strategy (<i>Maurice Braun I Room</i>)▪ Marketing and Business Development Leadership (<i>Maurice Braun II Room</i>)▪ Connecting with Four Generations in a Hybrid Workplace (<i>Maurice Braun III Room</i>)
3:45 – 4:15 PM	Break & Networking
4:15 – 5:15 PM	Keynote: Ryan Greenway, Assistant Federal Liaison, Caltrans Commitment to Funding a Shared Vision with Our Partners – How California and Other States are Implementing IIJA (<i>Charles Reiffel Room</i>)
5:15 PM	Cocktails & Heavy Hors d’Oeuvres (<i>Alfred Mitchell Room</i>)

SESSIONS

AI and the Future of the A/E Industry

★ OPENING KEYNOTE FOLLOWED BY BREAKOUT SESSION

NEIL LEACH, PROFESSOR, FLORIDA ATLANTIC UNIVERSITY
FEBRUARY 12, 9:00 - 10:30 AM

The biggest game changer right now in terms of the future of the AEC Industry is undoubtedly Artificial Intelligence (AI). But what exactly is AI, and, more importantly, what impact is it likely to have on the AEC industry?

The applications of AI, like 'MidJourney' and 'ChatGPT,' are simply that — applications, not what AI actually is. It is, therefore, important for us to understand it and be aware of the changes that are going to happen with the introduction of AI, as well as be prepared to both harness its advantages and mitigate against its disadvantages. In his presentation, Neil Leach, a professor at Florida Atlantic University and author of *Architecture in the Age of Artificial Intelligence*, will discuss what Artificial Intelligence really means, the impacts it's already had on the AEC industry, and what the future might look like with AI, not only in the AEC industry, but for society as a whole.

Aligning Purpose and Strategy

CARA BOBCHEK
BREAKOUT SESSION A • FEBRUARY 12, 11:00 AM - 12:15 PM
BREAKOUT SESSION D • FEBRUARY 13, 10:30 - 11:45 AM

As a consumer, you tend to align your purchases, products you use, and even the coffee shop you frequent with your personal affinities and values. Those brands and businesses are well aware of your preferences, and they invest heavily in engaging you: that's their strategy.

The research is plentiful and clear: organizations that align their strategy with their core purpose enjoy healthier cultures, more engaged and productive employees, and more robust financial performance than organizations that don't. Firms driven by a beneficial purpose consistently outperform the stock market by a significant margin.

In this session, we'll explore how you're defining your firm's purpose and strategy. Is your purpose a touchstone in decision making? Where have you succeeded and where have you faltered? What benefits have you seen? Are your clients engaged with your purpose? Are your employees? Have you drawn a straight line from purpose to profitability?

SESSIONS, CONT.

Private Equity's Position in M&A

COLVIN MATHESON & MATT GOUGH

BREAKOUT SESSION A • FEBRUARY 12, 11:00 AM - 12:15 PM

BREAKOUT SESSION E • FEBRUARY 13 12:45 - 2:00 PM

There is no question that Private Equity (PE) has finally warmed up to AEC and environmental consulting firms and become a clear alternative to traditional M&A activity. What does this potential type of 'financial investor' mean for your firm? This roundtable will tease out our attendees' thoughts, concerns, reactions, and experiences as we try to debunk myths and help set expectations for what might be an 'elegant solution' to manage ownership transitions going forward.

Change Leadership: Stories from the Front Lines ★PANEL

RICH FRIEDMAN & CARA BOBCHEK, MODERATORS

FEBRUARY 12, 1:15 - 2:15 PM

We know that progress isn't possible without change—and that change is difficult. CEOs face changes all the time, whether from a merger or acquisition; a market-driven shift in strategic positioning; an internal reorganization; or other drivers. Sometimes they manage these changes intentionally, and many other times they simply roll with the punches. During this panel discussion, we'll explore leaders' experiences with change initiatives: What went well? What do they wish they'd done differently? Did they plan ahead to manage the change? How might they measure the effectiveness of the outcome of the change? Was it worth it in the end? Participants will hear real-world case study examples as well as have the opportunity to query the panel and share their own thoughts around Change Leadership.

SESSIONS, CONT.

Forming and Optimizing Your Board of Directors

KATHRYN SPRANKLE

BREAKOUT SESSION B • FEBRUARY 12, 2:45 – 4:00 PM

You are the top leader in your organization. It's a big job. You have big ideas and strong support from your corporate team. You have great colleagues in groups like Vistage and business community contacts who are often terrific sounding boards when you feel 'stuck.'

Yet, you can't talk about everything...like about your firm's market and business strategies, potential acquisitions, issues with your fellow C-Suiters and your own occasional misgivings about firm direction.

Among other things, a *well functioning* Board of Directors will

- Bring a range of professional experiences to discussions.
- Keep their focus on long-term, outside business influences while you focus on your company today.
- Sit with you quarterly to talk about Strategic Plan progress and 'how you're doing.'
- Bring extra financial acumen to support your CFO/Treasurer.
- Step in as needed to deal with an out-of-line officer or shareholder.
- Shine an independent light on sticky internal issues.
- Tell you what you need to hear.

If you have a Board like this, please join us to share how it came together. If you don't yet have the Board of your dreams, let's talk about it!

Your Future 'People Strategy': Recruiting and Leadership Development

RICH FRIEDMAN & BARBARA IRWIN

BREAKOUT SESSION B • FEBRUARY 12, 2:45 – 4:00 PM

BREAKOUT SESSION E • FEBRUARY 13 12:45 – 2:00 PM

Recruiting next-gen leaders means hiring for the company we want to be, not the one we are right now. World and business affairs are shifting too rapidly to simply cast a quick eye around the firm to see who can move up into a newly created or vacated role. And loyalty, valuable as it is, is not a professional qualification. In this session, we'll look at preparing for key leadership hires:

- Working from the strategic plan
- Understanding that what worked in a specific role in the past needs to be updated to address our future's new demands
- Clearly identifying key leadership competencies and expectations
- Including internal and outside candidates in the same process
- Understanding the 80/20 rule: That finding the perfect candidates means continuous development and learning
- Setting reasonable milestones and expectations for success

SESSIONS, CONT.

Connecting with Four Generations in a Hybrid Workplace

KATHRYN SPRANKLE

BREAKOUT SESSION C • FEBRUARY 12, 4:15 – 5:15 PM

BREAKOUT SESSION F • FEBRUARY 13, 2:30 – 3:45 PM

Depending on the size of your firm, you're probably leading a motley staff among four generations, in multiple locations, working various schedules. How does your leadership get its arms around accommodating such a broad range of employee needs and desires?

- How do you form and maintain a culture of shared values?
- How are important initiatives and expectations communicated to staff who hear and interpret things differently?
- What are you doing to support intergenerational communication to foster effective mentoring and coaching?

In this session, we'll share communications successes and mishaps in policy-setting, performance evaluation, job change, shifts in company strategy and direction, and other milestones in employees' lives at your company.

Our Industry Doesn't Fully Understand Marketing and Business Development

RICH FRIEDMAN

BREAKOUT SESSION C • FEBRUARY 12, 4:15 – 5:15 PM

BREAKOUT SESSION F • FEBRUARY 13, 2:30 – 3:45 PM

We say the two terms in the same breath, thereby conflating two distinct activities that in fact require different talents, skills, and approaches. And, if we're honest, year after year, we rarely upgrade our processes or the staff we need to execute effectively, rather hanging on to staff that perpetuate old habits. It's time to take a hard look at what we're doing vis-a-vis what's currently known of the science of market positioning and the art of client engagement. Among the topics we'll discuss:

- Breaking away from the same-old, same-old marketing and BD
- How to bust through the 'I'm too busy' mantra
- What your clients are saying on this topic: Actual quotes from client perception studies
- The vital role of a strategic, client-focused business plan as an antidote to reactive, ad hoc actions

SESSIONS, CONT.

What a difference a year makes! Continuing Emerging Risk Trends Affecting A/E Firms in 2024

BRETT GOUGH & MATT GOUGH

BREAKOUT SESSION C • FEBRUARY 12, 4:15 – 5:15 PM

BREAKOUT SESSION D • FEBRUARY 13, 10:30 – 11:45 AM

- Delivery Methods – Progressive Design Build
- Project Development in the Private Sector
- Potential slowdown of M&A and Private Equity
- Update on A&G A/E Survey – Professional Liability Rates

Recruitment/People Strategy in a Hybrid Workplace **★PANEL**

BARBARA IRWIN & RICH FRIEDMAN, MODERATORS

FEBRUARY 13, 9:00 – 10:00 AM

The hybrid workplace has flipped recruiting, professional development, and staff engagement on their heads. How are firms leaning into this new normal so as to build the company they want to be, rather than the one they are right now? In this interactive panel session, we'll hear from the CEOs of three firms who are tackling these challenges. What's worked for them? What hasn't? What's surprised them (good or bad)? Join us for a robust, candid discussion and sharing of best practices, and come prepared to share your experiences.

Compensation is Much More than Numbers

BARBARA IRWIN & DAVID COHEN

BREAKOUT SESSION D • FEBRUARY 13, 10:30 – 11:45 AM

BREAKOUT SESSION F • FEBRUARY 13, 2:30 – 3:45 PM

Compensation plan design and implementation have critical impacts on firm performance and culture. Ideally, package formulae are clear and consistent, reflecting company strategic and financial goals, as well as providing those intangible 'feel-good' components so important to employee motivation. Managed carefully, good plans align employee behavior with firm strategy and fuel stronger performance. An inconsistently managed and confusing compensation program will demotivate employees and create barriers to key growth initiatives like promotions, new hires, and mergers/acquisitions.

This roundtable will address how firms approach bonus/incentive plans, best practices that are shown to improve performance, and what insights may be gained from our collective experiences.

SESSIONS, CONT.

You're the CEO! Now What? New CEO Roundtable

KATHRYN SPRANKLE & CARA BOBCHEK
BREAKOUT SESSION E • FEBRUARY 13 12:45 - 2:00 PM

For attendees who have been appointed to their roles within the last couple of years, this session is an opportunity to share and compare early experiences:

- Is the job what you expected?
- How were you onboarded?
- Did you inherit a corporate team, or have you formed your own 'dream team'?
- What are the greatest differences between your challenges and those of your predecessor?
- Do you feel supported by your Board?
- Anything else you'd like to hear about from your peers

Commitment to Funding a Shared Vision with Our Partners — How California and Other States are Implementing IJJA ★KEYNOTE

RYAN GREENWAY, ASSISTANT FEDERAL LIAISON, CALTRANS
FEBRUARY 13, 4:15 - 5:15 PM

The Infrastructure Investment and Jobs Act (IJJA) authorizes \$1.2 trillion to improve roadways and bridges, freight projects, public transportation and safety, and address climate change, with \$550 billion of the funding going toward new investments and programs.

The California Department of Transportation (Caltrans) will share how they are implementing the transportation-related provisions of IJJA, including an overview of the legislation, historical investments and successful partnerships with other states. Our speaker will also highlight transformative projects and emerging technologies, furthering California's standing as a world leader in clean transportation.

NOTES

NOTES



**2024 Evaluation Survey for
Sessions & Overall Event**

Save the Date

Join Us in 2025!

March 3–5, 2025

**Fontainebleau Hotel
Miami, Florida**

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