



EFCG

Environmental Financial
Consulting Group

2025 HR LEADERSHIP CONFERENCE AGENDA

For the Architecture, Engineering, and Consulting (AEC) Industry

May 14-16, 2025

JW Marriott Buckhead Atlanta, GA



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Partners**

28th ANNIVERSARY
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WELCOME



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ABOUT EFCG

EFCG is the leading consulting and investment banking firm in the Architecture, Engineering, and Consulting (AEC) industry. Our mission is to provide a strategic edge to AEC firms to advance the industry through our end-to-end, integrated solutions that support executive leaders with their most critical strategic and financial decisions.

In the last 35 years, EFCG has served as a retained advisor to 550+ firms, developed the most extensive proprietary industry database of financial and business metrics, held over 100 executive conferences, and advised on 240+ M&A transactions. The relationships we have formed with the executive teams at every major AEC firm make us the most trusted corporate finance, strategic, and M&A advisor.

 **EFCG is the leading advisor to AEC firms, providing expertise in:**

Management Consulting

550+
AEC Firms Advised

- Strategic Planning
- Corporate Financial Benchmarking
- Valuations
- Talent & Compensation
- Technology & Innovation
- Sustainability & ESG

Mergers & Acquisitions

240+
M&A Transactions Advised On

- Sell- & Buy-Side Assignments
- Capital Structure Analysis
- Corporate Divestitures & Tech Spinouts
- Strategic & Private Equity Partner Engagement
- Integration Planning
- Due Diligence & Market Studies

Leadership Conferences

100+
Conferences Hosted

- Analysis on AEC Trends from EFCG's Proprietary Industry Database
- Perspectives from Subject Matter Experts and Industry Executives
- Invaluable Peer-Networking Opportunities

Advanced Data Analytics & Insights

EFCG has the most comprehensive proprietary database in the industry

6
Annual
Surveys

8M+
Data Points
Every Year

500+
Database
Contributing Firms

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ABOUT EFCG'S HR LEADERSHIP CONFERENCE

Each year, AEC Industry HR leaders from firms of all sizes, markets, geographies, and cultures come together to share their insights and learnings on pivotal HR strategies, policies, and metrics. The agenda spans across topics from the building talent shortage to AI and automation inside HR.

All this exchange is augmented by EFCG's extensive expertise in talent strategy and financial analysis, which leverages our industry financial, compensation, and HR proprietary databases.

We are excited to announce that our 2025 program was again approved for credit hours from both the HRCI and from SHRM, a benefit unique to EFCG conferences.



Dates & Times

Wednesday, May 14th 6:00 pm – 7:30 pm ET

Thursday, May 15th 8:30 am – 7:30 pm ET

Friday, May 16th 9:00 am – 1:30 pm ET

Welcome Reception

Time: Wednesday, May 14th 6:00 pm – 7:30 pm ET

Location: PATH Museum

3399 Peachtree Road NE, Atlanta, GA 30326

Enjoy fellowship, drinks, and hors d'oeuvres at the unique PATH Museum to begin your 2025 EFCG HR Leadership Conference experience.

Conference Venue

Times: Thursday, May 15th 8:30 am – 5:00 pm ET

Friday, May 16th 9:00 am – 1:00 pm ET

Location: JW Marriott Atlanta Buckhead, Phoenix Ballroom

3300 Lenox Rd NE, Atlanta, GA 30326

Thursday Evening Networking Reception & Dinner

Times: Thursday, May 15th 5:00 pm – 7:30 pm ET

Location: JW Marriott Atlanta Buckhead, Charleston Ballroom

3300 Lenox Rd NE, Atlanta, GA 30326

Photography & Press

Recordings and images from the event may be used for live or on-demand sessions, EFCG materials, or by other participating firms in their own promotions. If you prefer not to be recorded or photographed, please let EFCG know in writing at brogers@efcg.com. Press will be invited to the event and may publish articles on the event and its sessions.

Attire

Business casual

Photographs from The JW Marriott Atlanta Buckhead Website

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HR LEADERSHIP CONFERENCE

May 14-16, 2025

SPONSORSHIP PARTNERS

We are especially thankful for the collaboration we have with our Sponsorship Partners.

TRANSEARCH
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TRANSEARCH is the global leader in executive search and leadership consulting. We build teams of transformational leaders who can stay one step ahead of a changing world. We are founded on a culture of partnership with a strong focus on excellence. Our vision is to move beyond what is defined as leadership and talent acquisition. We are motivated by what is “right” for our clients (and anticipating where they are going) and becoming a yardstick for quality. We are always pushing the envelope to stay ahead of the curve. Through proprietary innovation, world-class industry experts, and an unparalleled global network, we will find the right leader for your business – someone who will seamlessly integrate and be successful from day one.

Visit www.transearch.com.



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(All Times in Eastern Time)

Wednesday, May 14, 2025

6:00 pm – 7:30 pm

Welcome Reception

Thursday, May 15, 2025

8:30 am – 9:00 am

First-Timer Breakfast Meet-and-Greet

9:00am – 9:30am

Breakfast Meet-and-Greet

9:30 am – 10:45 am

Session 1: AEC Industry Overview: Critically Assessing the Data

10:45 am – 11:15 am

Morning Coffee Social

11:15 am – 12:00 pm

Session 2: Partnering with Leadership: Alignment of HR Strategies with Business Goals

12:00 pm – 1:00 pm

Lunch

1:00 pm – 1:45 pm

Session 3: Leveraging Tools and Systems for Operational Excellence

1:45 pm – 2:00 pm

Refresh Break

2:00 pm – 2:50 pm

Session 4: Breakout Sessions

4A: Hybrid/Remote Working Models

4B: Practical Applications of AI

4C: Leveraging Equity-Based Incentives

3:00 pm – 3:45 pm

Session 5: The Talent Shortage Update: The Latest Industry Data and How Firms Are Planning Ahead

3:45 pm – 4:00 pm

Afternoon Break

4:00 pm – 5:00 pm

Session 6: HR Leaders Lessons Learned

5:00 pm – 7:30 pm

Evening Networking Reception & Dinner

Friday, May 16, 2025

9:00 am – 9:30 am

Breakfast Reconnect

9:30 am – 10:30 am

Session 7: Cultivating a Culture of Belonging Amid Change

10:30 am – 10:45 am

Refresh Break

10:45 am – 11:45 am

Session 8: Breakout Sessions by Firm Size: Analyzing and Optimizing Executive Leadership Structures

11:45 am – 12:10 pm

Refresh Break and Grab Lunch for Final Session

12:10 pm – 1:00 pm

Session 9: Post-Merger Integration Done Right: How to Successfully Bring Two Workforces Together

1:00 pm – 1:30 pm

Closing Coffee & Lunch Conversation

(All Times in Eastern Time)

Thursday, May 15, 2025

8:30 am – 9:00 am

Phoenix Ballroom 1/3/5, 2nd Fl

9:00 am – 9:30 am

Phoenix Ballroom 1/3/5, 2nd Fl

9:30 am – 10:45 am

Phoenix Ballroom 2/4/6, 2nd Fl

10:45 am – 11:15 am

Phoenix Ballroom Foyer, 2nd Fl

11:15 am – 12:00 pm

Phoenix Ballroom 2/4/6, 2nd Fl

12:00 pm – 1:00 pm

Phoenix Ballroom 1/3/5, 2nd Fl

First-Timer Breakfast Meet-and-Greet

Breakfast Meet-and-Greet

Session 1: AEC Industry Overview: Critically Assessing the Data

Amidst disruptive trends like AI and evolving business models, AEC firms are swiftly reassessing their corporate strategies and market positions to maintain a competitive edge. Managing Partner Rebecca Zofnass will unveil the impact of these significant trends as she discloses the results of EFCG’s 2025 AEC Industry Survey — the most comprehensive proprietary dataset analyzing key financial and strategic metrics within the industry. During this presentation, Zofnass will provide the industry’s financial performance in 2024 and anticipations for 2025 and 2026 and talk about how this all ties back to this industry’s key asset - its talent.

Presenter:

Rebecca Zofnass, EFCG Managing Partner, Strategy & Corporate Finance

Morning Coffee Social

Session 2: Partnering with Leadership: Alignment of HR Strategies with Business Goals

As people-focused businesses, AEC firms rely on the effective integration of their HR strategies with the business and operational goals of the firm. This session will highlight our panelists’ experiences in building successful partnerships with their executive peers, discussing what has worked—and what hasn’t—to establish productive relationships that have enabled a successful business strategy centered on people.

Moderator:

Julie Hasiba, EFCG Managing Partner, Talent & Compensation

Panelists:

Rancie Bernal, Managing Director, HR, Trinity Consultants

Bob Chapman, Chief People Officer, Trilon Group

Allison Colantuoni, Chief People Officer, Colliers Engineering & Design

Lunch

1:00 pm – 1:45 pm
Phoenix Ballroom 2/4/6, 2nd Fl

Session 3: Leveraging Tools & Systems for Operational Excellence

In a session on evolving work strategies, panelists will explore what tools and systems have enhanced their HR team's efficiency and productivity, transforming daily operations. The discussion will highlight AI and other emerging technologies in HR, with real-world examples and best practices.

Moderator:

Marcus Quigley, EFCG Partner, Technology & Innovation

Panelists:

JaNette Bridgewater, Director, HR, Freese & Nichols
Sandra Pond, Chief Human Resources Officer, Benesch
Chelsea Seaby, Director, HR, Kohn Crippen Berger

1:45 pm – 2:00 pm
Phoenix Ballroom Foyer, 2nd Fl

Refresh Break

2:00 pm – 2:50 pm

Session 4: Breakout Sessions

Atlanta Room, 2nd Fl

4A: Hybrid / Remote Working Models

This session will delve into the latest analysis of operational models in AEC firms, exploring challenges associated with hybrid and remote work environments. These include ensuring consistent high-quality client deliverables, attracting top talent, fostering employee engagement, identifying paths for professional growth, and promoting effective team management in virtual settings. Participants will be encouraged to share their own experiences and solutions to these issues within their firms.

Facilitator:

Addy Orcutt, EFCG Consultant, Strategy, Finance & Talent Strategy

Phoenix Ballroom 2/4/6, 2nd Fl

4B: Practical Applications of AI

As AI continues to erupt in this industry, there is tremendous opportunity to create better processes, automate routine tasks, and even deliver more accurate analytics. In this session, EFCG Partner Marcus Quigley will examine how AEC firms are leaning into and capitalizing on their AI investments. He will share examples of how employees can take advantage of AI for everyday use within HR teams and across their organizations.

Presenter:

Marcus Quigley, EFCG Partner, Technology & Innovation

Columbia Room, 2nd Fl

4C: Leveraging Equity-Based Incentives

In collaborative roundtable discussions, participants will exchange insights on how their firms implement equity-based incentives. Topics will cover these incentives' role in recruitment, retention, and firm performance, along with key legal, tax, and compliance considerations.

Facilitator:

Rebecca Zofnass, EFCG Managing Partner, Strategy & Corporate Finance

(All Times in Eastern Time)

Thursday, May 15, 2025

3:00 pm – 3:45 pm

Phoenix Ballroom 2/4/6, 2nd Fl

Session 5: The Talent Shortage Update: The Latest Industry Data and How Firms Are Planning Ahead

In this session, our panelists will discuss strategies for attracting, retaining, and nurturing top talent in a competitive environment. From rethinking recruitment approaches to cultivating a culture of ongoing learning and development, they will provide practical solutions to navigate the intricacies of talent acquisition and management.

Moderator:

Dimitri Milonis, EFCG Senior Vice President, Talent & Compensation

Panelists:

Summer McCool, Senior Talent Manager, Weston Solutions
Jennifer Stanley, People Operations Leader, Americas, Arup
Janelle Willford, SVP, Human Resources, Wright Services

3:45 pm – 4:00 pm

Phoenix Ballroom Foyer, 2nd Fl

Afternoon Break

4:00 pm – 5:00 pm

Phoenix Ballroom 2/4/6, 2nd Fl

Session 6: HR Leaders Lessons Learned

EFCG is bringing back this attendee-favorite discussion, with respected industry leaders as panelists who will share transformative moments that have shaped their careers. Panelists will highlight the key lessons learned from those experiences and provide valuable and actionable takeaways for attendees to reflect on.

Moderator:

Jessica Zofnass Barclay, EFCG Managing Partner, M&A

Panelists:

Keri Kocur, Chief People Officer, VHB
Deborah Owens, Chief People Officer, SWCA Environmental Consultants
Jennifer Plauche-Brown, Chief Human Resources Officer, Geosyntec
Emily Reed, VP, Human Resources & Administration, APTIM

5:00 pm – 7:30 pm

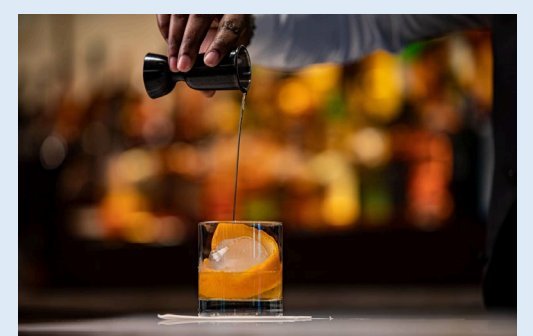
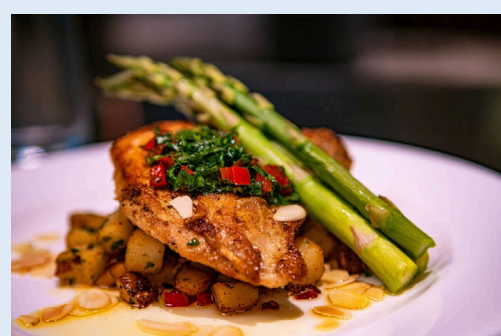
Charleston Room 1&2, 2nd Fl

Evening Networking Reception & Dinner

Evening Networking Reception & Dinner

Join us to enjoy dinner, drinks, and conversation with colleagues as we wrap up a full day of engagement.

Photographs from The JW Marriott
Atlanta Buckhead Website



(All Times in Eastern Time)

Friday, May 16, 2025

9:00 am – 9:30 am
Phoenix Ballroom 1/3/5, 2nd Fl

9:30 am – 10:30 am
Phoenix Ballroom 2/4/6, 2nd Fl

10:30 am – 10:45 am
Phoenix Ballroom Foyer, 2nd Fl

10:45 am – 11:45 am
Rooms to be Announced

11:45 am – 12:10 pm
Phoenix Ballroom Foyer, 2nd Fl

12:10 pm – 1:00 pm
Phoenix Ballroom 2/4/6
2nd Floor

1:00 pm – 1:30 pm
Phoenix Ballroom 1/3/5, 2nd Fl

Breakfast Reconnect

Session 7: Cultivating a Culture of Belonging Amid Change

Culture sits at the core of every AEC firm. Recent sentiment and executive orders have provoked firms to reflect on who they are as a firm and how they can continue to create a culture of belonging. Session panelists will share their firm's current thinking on how they see the future of this issue developing, recognizing that the value of inclusive strategies to the business and employees remain crucial.

Moderator:

Julie Hasiba, EFCG Managing Partner, Talent & Compensation

Panelists:

Victoria Delligatti, Director, HR, Langan

Julie Jennings, SVP, People, GEI Consultants

Sabrina Smith, VP, Human Resources, EnSafe

Refresh Break

Session 8: Breakout Session by Firm Size: Analyzing and Optimizing Executive Leadership Structures

In this interactive session, attendees will be grouped by firm size to explore different leadership structures. Each group will examine the advantages of the structures represented within their group and design an 'ideal' leadership framework, identifying its key strengths and challenges. After the session, the collective insights will be shared with attendees to enable broader discussions with their executive teams.

Facilitators: EFCG Team Members

Refresh Break and Grab Lunch for Final Session

Session 9: Post-Merger Integration Done Right: How to Successfully Bring Two Workforces Together

In a people-focused industry, the key to a successful M&A transaction is effectively integrating the workforces of the two firms into a cohesive culture. While this may seem like a straightforward goal, the integration approach can vary widely depending on the goals of the transaction. In this session, our panelists will share their experiences with recent firm integrations and lessons learned in the process.

Moderator:

Vishal Menon, EFCG Vice President, Strategy & Corporate Finance

Panelists:

Heather Eickhoff, CHRO, Gannett Fleming TranSystems

Marlene Humbert, SVP, Human Resources, Accenture

Closing Coffee & Lunch Conversation