



**Environmental
Financial
Consulting
Group**



2023

Rising Leaders Conference Agenda

**For Architecture,
Engineering, and
Consulting Firms**

**January 26th – 27th
Thursday - Friday**

Convene
101 Greenwich Street
New York, NY 10006





2023 Rising Leaders Conference

For Architecture, Engineering, and Consulting Firms

Event Overview



This event welcomes the top talent from architecture, engineering, and consulting (AEC) firms to enjoy a 2-day networking opportunity and the chance to discuss the major trends of today with peers. EFCG utilizes its leading industry insights and expertise advising AEC executives to provide valuable content that attendees can learn from and leverage in their positions.

Dates & Times

Thursday, January 26th 9:00 am – 8:00 pm ET
Friday, January 27th 8:30 am – 1:00 pm ET

Venue Location

Convene, 101 Greenwich Street, 23rd Floor, New York, NY 10006

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. Press will be invited to the event and may publish articles on the event and its sessions.

Attire

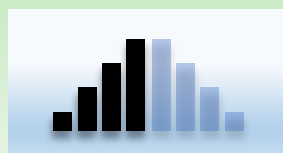
Business casual

Evening Reception and Dinner at Wolfgang's Tribeca Thursday, January 26th from 5:00 pm – 8:00 pm ET



EFCG is the leading advisor to AEC firms

In the last 33 years, EFCG has served as a retained advisor to 500+ firms, developed a proprietary industry database of financial and business metrics, held nearly 100 executive conferences, and advised on 180+ M&A transactions. The relationships we have formed with the executive leaders and key decision makers at every major AEC firm make us the most trusted financial, strategic, and M&A advisor.



Benchmarking & Data Analysis



Financial Advisory



M&A Advisory



Technology Strategy



Talent Strategy



Sustainability & ESG Strategy

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Thursday, January 26, 2023

9:00 am – 9:30 am	Breakfast Meet-and-Greet
9:30 am – 11:00 am	Session 1: AEC Industry Overview: Critically Assessing the Data
11:00 am – 11:30 am	Morning Coffee Social
11:30 am – 12:30 pm	Session 2: M&A Trends and Best Practices
12:30 pm – 1:30 pm	Lunch
1:30 pm – 2:20 pm	Session 3: Breakouts Session 3A: Systems for Success: Foundational Technology Session 3B: Measuring ESG Impact: The Environmental & Social Influence Session 3C: Managing the Rising Compensation Demands
2:30 pm – 3:20 pm	Session 4: How to Bring Tech & Talent Together to Attract & Keep Talent
3:20 pm – 3:40 pm	Afternoon Coffee
3:40 pm – 4:40 pm	Session 5: 2022 EFCG CEO & CFO of the Year Lessons Learned
5:00 pm – 8:00 pm	Evening Reception and Dinner at Wolfgang's Tribeca 409 Greenwich Street, New York, NY 10013

Friday, January 27, 2023

8:30 am – 9:00 am	Breakfast Reconnect
9:00 am – 10:00 am	Session 6: How to Take Your Promising Career to the Next Level
10:00 am – 10:20 am	Morning Coffee Social
10:20 am – 11:00 am	Session 7: Breakouts Session 7A: Valuations and Internal Ownership Transitions Session 7B: Solving the “Data Puzzle” Session 7C: Company Culture: Its Impact on Firm Success & Your Influential Role in Fostering Positive Culture
11:10 am – 12:00 pm	Session 8: <i>Keynote:</i> Developing & Executing an Effective DEI Strategy
12:00 pm – 1:00 pm	Closing Coffee & Lunch



Questions? Email dmilionis@efcg.com



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2023 Rising Leaders Conference Agenda

For Architecture, Engineering, and Consulting Firms

Thursday, January 26, 2023

9:00 am – 9:30 am **Breakfast Meet-and-Greet**

9:30 am – 11:00 am **Session 1: AEC Industry Overview: Critically Assessing the Data**

As the AEC Industry heads into 2023, firms are beginning to see a strong recovery from the COVID-19 pandemic. However, firm leaders still have more questions than answers on what's to come and how they can best prepare. During this session, EFCG Managing Partner Rebecca Zofnass will share what major questions firms are asking, and how they are beginning to reassess their market position for continued success. Zofnass will then talk through the results of the exclusive 2022 EFCG CEO Survey – an extensive survey that industry CEOs complete each year – and share the shifts we are seeing in major metrics and trends.

Presenter:

Rebecca Zofnass, EFCG Managing Partner, Financial & Strategic Advisory

11:00 am – 11:30 am **Morning Coffee Social**

11:30 am – 12:30 pm **Session 2: M&A Trends and Best Practices**

EFCG will discuss major M&A market trends and metrics, using its proprietary data to show the shifts the AEC Industry has seen over the course of 30 years. With these figures as context, EFCG will then cover key moments and best practices in both the buy-side and sell-side process to ensure a successful transaction.

Presenter:

Jessica Barclay, EFCG Managing Partner, M&A Advisory
Clay Han, EFCG Consultant, Financial & Strategic Advisory

12:30 pm – 1:30 pm **Lunch**

1:30 pm – 2:20 pm **Session 3: Breakouts (See descriptions on Page 7)**

Session 3A: Systems for Success: Foundational Technology

Session 3B: Measuring ESG Impact: The Environmental & Social Influence

Session 3C: Managing the Rising Compensation Demands



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Thursday, January 26, 2023

2:30 pm – 3:20 pm Session 4: How to Bring Tech & Talent Together to Attract & Keep Talent

Technology and talent are two of the biggest challenges firms are facing today, as talent is scarcer and firms are feeling the pressure to become a center of technology excellence and innovation. Yet, often, these two challenges are addressed independently. Firms that figure out how to turn these demands into complementary strategic initiatives stand to provide a captivating employee experience and deliver greater results to their clients. EFCG will bring its Talent and Technology Practice Leads Julie Hasiba and Marcus Quigley together to provide insights on ways to bring technology and talent strategies together to win and keep employees.

Presenters:

Julie Hasiba, EFCG Managing Partner, Talent Advisory
Marcus Quigley, EFCG Partner, Technology Advisory

3:20 pm – 3:40 pm Afternoon Coffee

3:40 pm – 4:40 pm Session 5: 2022 EFCG CEO & CFO of the Year Lessons Learned

EFCG's 2022 CEO of the Year Kate Harris and 2022 CFO of the Year Alan Jennat will share their insights and lessons learned from their successful careers.

Moderator:

Jessica Barclay, EFCG Managing Partner, M&A Advisory

Panelists:

Kate Harris, President, CEO & Chair, Stanley Consultants
Alan Jennat, CFO, Arup

5:00 pm – 8:00 pm Evening Reception and Dinner at Wolfgang's Tribeca 409 Greenwich Street, New York, NY 10013

Enjoy time with colleagues at world-renowned Wolfgang's Steakhouse. Legend Wolfgang Zwiener, a chef known for his exceptional menus and quality ingredients, learned how to develop an award-winning restaurant experience from his early days at the iconic Peter Luger Steakhouse. Today he owns twenty-one restaurants across the world. Tonight, Rising Leaders Conference attendees get a chance to experience his menu over drinks and conversation.



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Friday, January 27, 2023

8:30 am – 9:00 am **Breakfast Reconnect**

9:00 am – 10:00 am **Session 6: How to Take Your Promising Career to the Next Level**

During this coffee-chat-style conversation, individuals who have shown impressive growth in their careers will reflect on how they've gotten to where they are today and provide actionable steps that you can take to shape your career for continued success as the future of your firm.

Moderator:

Julie Hasiba, EFCG Managing Partner, Talent Advisory

Panelists:

Vanessa Rogers, SVP, Hamer

James Bristow, Managing Director, UES

10:00 am – 10:20 am **Morning Coffee Social**

10:20 am – 11:00 am **Session 7: Breakouts (See descriptions on Page 8)**

Session 7A: Valuations and Internal Ownership Transitions

Session 7B: Solving the "Data Puzzle"

Session 7C: Company Culture: Its Impact on Firm Success & Your Influential Role in Fostering Positive Culture

11:10 am – 12:00 pm **Session 8: Keynote: Developing & Executing an Effective DEI Strategy**

Esteemed keynote speakers Brooke Bennett and Roger Hathaway from GEI Consultants and Annie Rezac from Ulteig will join EFCG to discuss the strategies their firms have taken to elevate the role of DEI. They will highlight their unique approaches to gaining firmwide buy-in and navigating the challenges that arose in the process. They will then share what communication styles and resources proved to be invaluable and conclude with some of the key lessons learned along the way and what's next in their firms' DEI journeys.

Moderator:

Vishal Menon, EFCG Consultant, Financial & Strategic Advisory

Panelists:

Brooke Bennett, Senior Geologist, GEI Consultants

Roger Hathaway, Vice President, GEI Consultants

Annie Rezac, Diversity, Equity and Inclusion Program Manager, Ulteig

12:00 pm – 1:00 pm **Closing Coffee & Lunch**



Breakout Session Descriptions

Thursday, January 26, 2023

1:30 pm – 2:20 pm

Session 3: Breakouts

Session 3A: Systems for Success: Foundational Technology

Foundational technologies such as CRM systems, ERP systems, and communication and collaboration tools, can vastly dictate how efficient and / or effective a firm operates. In this session, EFCG Partner Marcus Quigley will discuss how foundational technologies have transformed internal processes and how firms are making strategic investments to prepare for their clients' future needs.

Presenter:

Marcus Quigley, EFCG Partner, Technology Advisory

Session 3B: Measuring ESG Impact: The Environmental & Social Influence

In response to building client demands, investor pressure, and strategic foresight, AEC firms are ramping up their Environmental, Social and Governance (ESG) efforts with more firms issuing annual ESG reports every year. But what really makes up the E, the S, and the G? This session will focus on (a) the Environmental and Social aspects of ESG, (b) breaking down the common definitions and metrics associated with each that help firms measure and communicate their impact. It will then (c) talk through how firms can build momentum and capitalize on the impact of their ESG efforts.

Presenter:

Vishal Menon, EFCG Consultant, Financial & Strategic Advisory

Session 3C: Managing the Rising Compensation Demands

Talent remains to be the biggest topic for AEC firm leadership, as the industry continues to feel pressure from competitors, higher turnover, recruitment challenges, and inflation. EFCG's Compensation Strategy Consultant Dimitri Milionis will address how firms are responding to these pressures with two of the most influential resources: compensation and benefits. Milionis will reference the results of EFCG's Compensation Survey – a comprehensive survey that industry executives complete each year – as part of this overview.

Presenter:

Dimitri Milionis, EFCG Vice President, Talent Advisory



Breakout Session Descriptions

Friday, January 27, 2023

10:20 am – 11:00 am **Session 7: Breakouts**

Session 7A: Valuations and Internal Ownership Transitions

For many firms, the decisions impacting valuations also impact the success of their ownership transition planning. EFCG will walk through this “valuation conundrum,” looking at the metrics used to conduct valuations and the key considerations firms need to make when approaching internal ownership transitions.

Presenter:

Clay Han, EFCG Consultant, Financial & Strategic Advisory

Session 7B: Solving the “Data Puzzle”

Many AEC firms – particularly small- and medium-sized ones – find themselves working with multiple IT systems which don’t quite work with each other. This session, led by EFCG Vice President of Data and Analytics Jackson Golden, will review a typical data landscape for an AEC firm, some common problems that arise, and some tools for integrating data that are better than Excel, but don’t require completely new software. Golden will then discuss how to know when the solution actually may be to bring in a new software solution. This session will integrate live demos that will demystify some non-Excel approaches to data integration.

Presenter:

Jackson Golden, EFCG Vice President, Data & Analytics

Session 7C: Company Culture: Its Impact on Firm Success & Your Influential Role in Fostering Positive Culture

Every firm’s culture is significant in underpinning service, teamwork, growth, profitability and rewards – but all organizational cultures are different. Join the session to gain insight on how leadership excellence influences positive cultures and to enhance awareness of the actions you can and should take in support of its advancement.

Presenter:

Ted Lower, EFCG Senior Advisor

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Event Logistics

Venue Location

Convene, 101 Greenwich Street 23rd Floor, New York, NY 10006

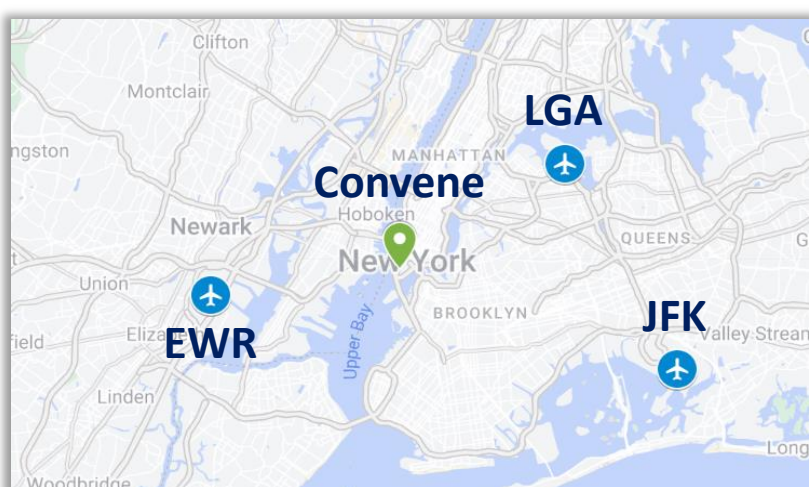
Hotel Options

Hotel	Walk to Convene	Nightly Pricing
The Cloud One Hotel New York – Downtown 133 Greenwich Street, New York, NY 10006 (646) 434-4649	1 minute	\$340 - \$460
New York Marriott Downtown 85 West Street At, Albany St, New York, NY 10006 (212) 385-4900	2 minutes	\$310 - \$475
The Washington 8 Albany Street, New York, NY 10006 (646) 826-8600	2 minutes	\$120 - \$800
Millennium Hilton New York Downtown 55 Church Street, New York, NY 10007 (212) 693-2001	6 minutes	\$145 - \$250
The Beekman, A Thompson Hotel 123 Nassau Street, New York, NY 10038 (212) 233-2300	10 minutes	\$360 - \$4,000
Conrad New York Downtown 102 North End Avenue, New York, NY 10282 (212) 945-0100	12 minutes	\$420 - \$840

Transportation to and From Airport

Airport	Outside Rush Hour	Rush Hour
Newark Liberty International (EWR)	30-minute drive	60-minute drive
LaGuardia (LGA)	45-minute drive	90-minute drive
John F. Kennedy (JFK) <i>Allow additional time to get through airport</i>	60-minute drive	120-minute drive

Venue Location in Relation to Airport



Venue Location in Relation to Hotel Options

