



**2010 Fall Conference**  
**Industry Trends and Markets Forecast**  
**October 17-20, 2010**  
**El Conquistador Resort, Puerto Rico**  
**EDUCATIONAL SESSIONS**

## **SUNDAY**

### **October 17, 2010**

**8:30 am-3:00 pm**

#### **Sales and Marketing Forum**

Join industry professionals to share ideas, promote best practices and network with peers. Separate registration fee required if not paying the full Conference fee.

**2:00 pm-5:00 pm**

#### **CEO Roundtables**

CEOs and senior principals will lead engaging group discussions with fellow executives on such topics as profitability, business practices, risk management and liability, human resources/professional development, and marketing. Five roundtables are offered: Small firm (1-30 employees), Medium firm (31-100 employees), Medium-Large firm (101-250 employees), Large firm (251-500 employees) or Very Large firm (501+ employees).

**2:00 pm-4:00 pm**

#### **CIO Roundtables**

Join other chief information officers in a peer-to-peer discussion of emerging topics, IT challenges, new technologies, and best practices.

**4:15 pm-5:15 pm**

#### **Joint CEO-CIO Roundtable**

Following the CEO and CIO roundtables, these two groups will join together for a broader discussion of organization-wide challenges, administration and operations, intellectual property, and other issues of mutual concern.

## **MONDAY**

### **October 18, 2010**

**8:00 am-9:00 am**

**Opening General Session**

**Non-Traditional Financing for Public Infrastructure**

*Humberto Marrero, Puerto Rico Infrastructure Financing Authority; Geoffrey Yarema, Esq., Nossamon, LLC and Member, National Surface Transportation Infrastructure Financing Commission*

Join noted industry expert Geoff Yarema and the head of Puerto Rico's Financing for Public Infrastructure department for a lively discussion of both traditional and alternative approaches for financing public infrastructure projects, which some specific case studies from projects in Puerto Rico.

**9:10 am-10:15 am**

**General Session: Energy and Water Markets Forecast**

*Barry Worthington, Executive Director, U.S. Energy Association; G. Tracy Mehan, III, The Cadmus Group, Inc.*

Hear from experts in two expanding markets on prospects for the future.

**10:45 am-12:00pm CONCURRENT SESSIONS**

**Future Leaders: Are Yours Ready for the Challenges of the New Economy?**

*Geordie Aitken, Aitken Leadership Group*

Will your young employees be ready to lead the firm, when their time comes? Many AE firm leaders experience frustration with the younger generation, and this session will offer case-study examples of how to constructively engage and develop your Generation Y employees, fast-tracking their contribution to your firm's success. This interactive workshop with a leading industry consultant on growing the 'next generation' will explore proven strategies for developing future leaders in a firm of any size.

**BIM, the IPD Revolution and the Legal Issues You Need to Know**

*Timothy F. Hegarty, Zetlin & DeChiara, LLP*

Explore the benefits, risks and legal aspects of Integrated Project Delivery (IPD) and Building Information Modeling (BIM). The session will explore specific liability issues facing IPD projects today, including an overall definition of the difference between IPD and more traditional delivery methods. The success of IPD projects depends upon open communication, clearly defined roles and the ability explore non-traditional design and implementation guidelines. We will also discuss and explain the nuances of critical BIM and IPD related contract terms.

**Make it Rain or Feel the Pain - Business Development in A Changed World**

*Mark Goodale, Morrissey Goodale LLC*

Cold, hard fact: If your engineering firm can't make it rain, your days are numbered. Join Mark Goodale for a bit of soul searching as he challenges you to commit to building valuable, lasting business relationships and establishing a marketing machine that builds brand-name recognition. This session will be anything but a yawner, so bring your energy, an open mind, and an extra layer of skin— Mark won't be pulling any punches!

**IT Tools to Better Orchestrate Collaboration and Knowledge Sharing: Social Media and Beyond**

*James T. Walsh, AECOM*

In today's world, we develop various electronic identities, both internal to our firms and external to business. This session will explore where these external and internal groups/communications overlap, how companies can manage employees' various identities/communications, how the array of information technology tools now available - including social media - affect those interactions, and how firms can leverage those

tools to better communicate and collaborate. The session will also look at ways to improve both knowledge-sharing and documentation.



## **How Structural Engineers Can Work Effectively with Architects Who Use AIA C401**

*Bill Geisen, Graydon Head*

If your firm works as a sub-consultant to architects, come examine CASE's Commentary on AIA Document C401, the "Standard Form of Agreement Between Architect and Consultant." AIA Contract Document C401 incorporates by reference AIA Contract Document B101, the "Standard Form of Agreement Between Owner and Architect." The interplay between C401 and B101 cannot be over-emphasized. Using C401 without understanding fully the interrelationships with B101 is a recipe for disaster. This presentation will cover how the engineer's rights and obligations are impacted by these two agreements and CASE's recommended provisions to include in your contract with the architect.

### **12:15 pm-2:00 pm**

#### **Keynote Luncheon Featuring Joe Scarborough Politics and Morning Joe**

One of America's most respected political commentators, Joe Scarborough shares with audiences his trusted insights on today's political and policy headlines. A former member of Congress and the host of MSNBC's Morning Joe, Scarborough provides an unparalleled analysis and engages in a lively question-and-answer session on the stories that matter our audience. Looking ahead, Scarborough evaluates the Obama Administration and shows whether Obama's reform efforts will help—or hinder—the efforts of both political parties as they look to grow their influence over the electorate ahead of the 2010 midterm elections.

### **2:15 pm-3:30 pm CONCURRENT SESSIONS**

#### **Using Value Pricing to Get Paid What You're Worth**

*David Stone, Stone & Co.*

It is entirely possible for engineering firms to raise both their fees and their profits. But it's not as simple as just changing the price tag. Value pricing is not about raising your fees - it requires strategic positioning and packaging of your services in entirely new ways because clients are willing to pay higher prices, but only when they can clearly see higher value. There is a way for you to pull your firm out of the quicksand of fee competition and commodity pricing! In this provocative session, you will learn how we got ourselves into this mess and what you can do – starting today – to get yourself onto the high road of value pricing

#### **How One Company Has Learned to Tame Risk in Transportation Design-Build Projects**

*Erin Austin, Jack D. Beemer, Kenneth Wightman, David Evans & Associates, Inc.; Ted Aadland, Aadland Evans Constructors, Inc.*

Working as a designer under a design-build contractor on transportation projects has its own set of project risk issues. This session will offer perspectives from the construction contractor and design CEO, project manager, and risk attorney on these transportation project design-build risks and their appropriate mitigation. Working as a 'team' can move a company from worrying about DB projects to enjoying them



## Using Commercial Software Effectively for Building Structural Designs

*Pedro Sifre, Simpson Gumpertz & Heger*

The increasing proliferation and complexity of commercial analysis and design software has dramatically changed the practice of structural engineering in the last three decades. As software continues to evolve, engineering practice must also evolve to take full advantage of the productivity that these tools make possible. At the same time, the tools cannot be allowed to erode the soundness, logic, and safety of structural designs. Will the use of powerful software do away with the “gut feel” acquired from years of hand calculations and modeling with the tools available in the past? This session will explore many of the pitfalls associated with comprehensive design and analysis packages and will discuss simple methodologies for independent verification of results and how to institute a culture of skepticism among upcoming generations of designers that will prevent the misuse or abuse of ever more sophisticated tools.

### **2:15 pm-5:15 pm**

#### **NAECE Session –and Tips Your Organization Needs to Be Ready for Anything**

*Jeffrey W. Raynes, CAE, Past Chairman, American Society of Association Executives (ASAE)*

A continuation and expansion of the spring NAECE session, this interactive program will explore how best an organization can be prepared for unexpected transitions or events, including planning and resource considerations, what to have on hand and ready to use, handling pass words, and critical regulatory requirements.

### **4:00 pm-5:15 pm CONCURRENT SESSIONS**

#### **Information Modeling for Transportation**

*Susan Brandt and Eric Fletcher, Bentley Systems, Inc.*

This presentation offers insight and industry-specific details to help today’s engineers and managers use new information modeling technologies and methodologies as they plan for the future and address the real-world challenge of delivering and sustaining transportation infrastructure.

#### **Full Disclosure: What Directors and Officers Should Know About Fiduciary Responsibility to Shareholders**

*George E. Christodoulo and Kimberly Bakeberg, Lawson & Weitzen, LLP*

The leadership of each A/E/C firm has the duty to make decisions that allow the firm to succeed, but many firms are owned by shareholders who participate in management, direction, and operations. This means the roles of directors, officers, management, and shareholders are often blurred. This session will look at what responsibilities each role has, what must be communicated to whom when, and how leadership should act in the context of common situations to avoid legal pitfalls and personal liability.



#### **Lessons From Key Cases Involving Design Professionals**

*David Corkum, Donovan Hatem*

This session will provide attendees with an overview of seminal court decisions that have defined the legal roles, duties and obligations of design professionals. Attendees will learn the difference between common law (court decisions) and contract law and the duties imposed by common law versus duties assumed under a contract.

# TUESDAY

## October 19, 2009

### **8:30 am-9:45 am CONCURRENT SESSIONS**

#### **The Lake Delton Flood: Management and Politics of Fast Track-Rebuilding**

*Jim Borg, Mead & Hunt; John Langhans, MSA Professional Services*

On June 9, 2008, the eyes of the nation were fixed on images of houses floating in flood waters that overtopped and eventually breached a strip of land between Lake Delton and the Wisconsin River. The event eroded nearly 700,000 cubic yards of material and deposited it in the Wisconsin River, and a whole section of County Highway A was lost. A collaborative team was formed to respond to the Wisconsin DoT's fast-track request to restore the lake and highway, which prepared a design in only two months to close the breach and modify the dam. This presentation will describe the monumental effort involved in restoring Lake Delton and CTH A and will offer an example of effective project teaming and leadership.

#### **Using Information Technology to Track and Stimulate Project Funding**

*Joseph F. Phelan, Info Tech, Inc.*

With billions of dollars being funneled into the infrastructure stimulus package (and more to come), the question of accountability is taking center stage. This session will show actual technology in action in firms across the US and how these tools are helping meet ARRA requirements and increase efficiency. Beyond the stimulus, FHWA is beginning to demand more accountability from locals, as indicated in a recent report issued by the agency. Are you ready?

#### **Strategic Planning for Business Succession: The ESOP Solution**

*Erin Turley and Allison Wilkerson, Morgan Lewis & Bockius, LLP*

This session will focus on the use of employee stock ownership plans in the engineering industry to achieve tax-favored business succession and transition, while transitioning the firm's management to the next generation and creating a culture of equity participation and ownership. The session will also highlight the use of employee stock ownership plans to access tax-favored financing for business expansion and targeted acquisitions in a time of unprecedented opportunities for mergers and acquisitions. Lastly, we will examine the differences between traditional succession transition tools (like buy-sell agreements) and employee stock ownership plans paired with management equity participation outside the employee stock ownership plan.

#### **Brownfield Clean-up and Oil Spill Recovery – An Expanding Market**

*Colleen Costello, Langan Engineering and Environmental Services, Inc.*

Environmental reclamation is a growing market – from oil spills to Brownfield properties, there is plenty to do. This session will focus on business elements of the environmental/sustainability markets – where are the opportunities, case studies of ongoing or recent projects and what has proven successful, and partnerships in environmental problem-solving.

### **10:15 am-11:30 am CONCURRENT SESSIONS**

#### **How Mergers and Acquisitions are Changing Our Industry**

*Mick Morrissey, Morrissey Goodale LLC*

Mergers and acquisitions continue to sweep our industry – driven by changes in firm demographics, capitalization requirements and business models. And all of the trends point to continued industry consolidation. Sooner or later every firm is going to have to

decide if they are a buyer or a seller, or if they are going to sit on the sidelines. After this session you'll know why mergers and acquisitions are here to stay and their possible implications for your firm.

### **When Things Go Wrong: A Formal Process for Handling 'Nonconformances' and Errors Can Save the Day**

*James C. Klug, AECOM*

People don't generally try to make mistakes or break the rules, but in reality "stuff" happens. When it does, is your organization prepared to make the best of a bad situation and even turn these "problems" into "opportunities?" This session will present and discuss the concept and framework of a formalized method for dealing with such eventualities, and will explore the value of an aggressive but non-punitive approach.

### **Maintaining a Strategic Vision in Turbulent Times**

*Patty McManus Corcoran, Renaissance Leadership Consulting; Chip Corcoran, Olsson Associates*

As a leader, have the recent economic challenges caused your ability to see things from the 20,000 foot perspective to diminish? This session will give useful information about the importance of maintaining a long-term visionary focus, and specific tips on how to do this. In addition, a leadership competency model based on emotional intelligence competencies will be discussed – relating it specifically to maintaining a long term vision and leading through tough times. Lessons learned will be discussed and related to the ability to rise to the opportunities ahead with a compelling vision.

### **Managing Employee Mobile Computing Devices in the Office and in the Field**

*Chris Pinckney, Psomas*

Firms nationwide are struggling with how best to handle the mobile communication technologies that business in the 21<sup>st</sup> century requires. Some simply provide company cell phones to employees above a certain level, some provide mobile equipment on a case-by-case basis, and still others require employees to select and acquire a mobile device/smart phone of their own choosing, on each employee's desired network, with the company reimbursing employees for the cost of equipment and some portion of the monthly service fee. Which approach is best? This session will look at the positives and negatives of each.



### **Issues Facing Surveyors and Engineers in the Land Development Market**

*Blake Murillo, Psomas; Tim Cawood, McKim & Creed; Ted Aadland, Aadland Evans*

The COPS, Land Development Coalition and AGC leadership will lead a discussion on major topics and critical issues facing the industry. The discussion will include the contractor perspective – prospects for design build in the land development market as well as their overall market forecast over the next few years.

**11:45 am – 1:45 pm**

### **ACEC Awards Luncheon and General Session**

#### **Life in the Universe**

**Featuring Keynote Speaker Dr. Daniel Altschuler, *Former Director, National Astronomy and Ionosphere Center, Arecibo Observatory***

Dr. Daniel Altschuler will entertain with his knowledge on the facts and fictions of extraterrestrial life in our universe and share some of his research relating to hydrogen in quasars and galaxies. To be followed by the ACEC Awards Ceremony.

## **2:00 pm-3:15 pm CONCURRENT SESSION**

### **Sustainability with BIM – Opportunities in New Markets**

*Eric Wing, C&S Companies*

By using simple techniques, you can go beyond energy modeling and reach into the virtual building to extract valuable information such as materials being used and additives such as fly ash. This presentation will drill into the best practices, and offers a realistic look into the world of building databases, showing how BIM can be effectively used in the effort to achieve LEED-certified projects.

### **What Engineering Firms Need to Know About the AIA and AGC Integrated Project Delivery Contracts**

*Nahom A. Gebre and Mary Huzway, Victor O. Schinnerer & Company, Inc.*

Increasingly clients are demanding integrated project delivery (IPD) for the creation of capital assets. The roles, responsibilities, liability exposures and profit potential of engineering firms could be significantly impacted by IPD, so firms need to know what the standard documents could do to their viability and status. Both inter-professional engineering firms and those providing services directly to project owners need to know the best and worst of the concepts embodied in the current Integrated Project Delivery contract forms.

### **Financial Industry Outlook: How Financial Market Volatility Impacts Engineering Firm Success**

*Colvin Matheson, Matheson Financial Advisors*

This session will examine the nexus of uncontrollable macro-economic/financial trends and the impact on firm success. Where does “Wall Street” intersect with “Main Street”? What can firms learn from this downturn and how can they navigate the turbulent waters ahead given the dependence that E&C firms have on the availability of credit? Join us to discuss strategies for engineering firms to plot a course through the current capital markets.



### **Roundtable on Critical Issues Affecting MEP Firms**

*Roy Wilson, George Butler Associates, Inc.; Robin Greenleaf, Architectural Engineers, Inc.*

The CAMEE leadership will facilitate a discussion on major topics and critical issues facing the profession today.

## **2:00 pm-5:00 pm**

### **Senior Executives Institute Workshop: Building High Performance Teams to Succeed In the New Economy**

*Kyle Davy, Kyle V. Davy leadership Consulting; Rod Hoffman, S&H Consulting LLC; Geordie Aitken, Aitken Leadership Group*

To succeed in the “New Normal” business landscape, leaders need to build high performance cultures -- tapping into people’s beliefs, feelings, ideas, and stories to drive business results and enable strategic success. Explore the impact that the New Normal will have on our industry, and prepare for the resulting leadership challenges, in this interactive workshop with Senior Executives Institute (SEI) alumni and faculty.

## **3:45 pm-5:00pm CONCURRENT SESSIONS**

### **Keep Your Business in the Black: Legal Tools to Ensure Firm Success**

*Nicholas Wiczorek and Theodore F. Levin, Morris Polich & Purdy LLP*

Obtaining contracts in a down economy poses risks and potential benefits to engineering firms. In this economy, knowledge of fundamental contractual provisions, legal remedies and negotiating strategies can enhance a firm's ability to keep new projects in the funnel and maintain profitability. This session will provide simple explanations for contractual legal principles that will enhance client relationships, assure payment, and keep your firm "in the black."

### **Ground Source Heat Exchange – A Case Study in Alternative Energy Opportunities**

*Gregory P. DeSart, Geotechnical & Environmental Services, Inc.*

The "energy efficiency" industry is emerging as an important new market for consulting engineers. A GSHE system - a heating and/or cooling system that uses the Earth's ability to store heat in the ground and water thermal masses - differs from a conventional furnace or boiler by its ability to transfer heat versus the standard method of producing heat. As energy costs continue to rise and pollution concerns continue to be a hot topic, GSHE systems may hold a solution to both concerns. Even consulting engineers who are not directly involved with GSHE system design may enhance their value to their clients by simply being aware of the fundamental benefits of this emerging technology.



### **Small Firm CEO Roundtable**

*Rob Overfield, Engineering Associates*

Join members of the Small Firm Council to continue the discussions begun in Sunday's Small Firm CEO Roundtable of issues critical to smaller firms.

# **WEDNESDAY**

## **October 20, 2010**

### **8:45 am-10:00 am CONCURRENT SESSIONS**

#### **Zero Change Orders: How Integrated Project Delivery Can Improve Your Bottom Line**

*Robert Middlebrooks, Autodesk, Inc.*

Integrated Project Delivery is no longer just a theoretical approach to design and construction. As our industry develops contracts and builds on experiences, Trapelo Road successfully emerges as New England's first IPD project. This 65,000 sf. office, utilizing BIM and digital fabrication, achieved a LEED Platinum CI, on schedule and within budget, and serves as a clear example of the values of IPD collaboration, demonstrating the risks, rewards, structure, and metrics involved in this approach.

#### **Beyond Strategic Planning - Leveraging Scenario Planning for Future Success**

*Steve Isaacs, Advanced Management Institute for Architecture and Engineering*

Strategies trimmed to a pre-recession market don't fit the current outlook. But which of many possible futures should a firm's senior leaders now plan for? How can they leverage today's uncertainties to create winning actions? By moving beyond strategic planning to advanced methods better suited to the complexities of today's conditions. This workshop will present methods for using four new industry-oriented scenarios and scenario planning to direct and create your firm's preferred future.

### **10:15 am-11:30 am CONCURRENT SESSIONS**

## **Sustainability: How Facility Owners and Engineering Firms Can Achieve the Triple Bottom Line**

*Speakers TBD*

Engineers have historically focused on technical integrity in their projects and businesses. The modern world, however, is asking firms to expand their focus by looking to the Triple Bottom Line, which includes technical aspects but adds social/cultural and environmental impacts to the mix. This session will examine the Triple Bottom Line and will introduce a new infrastructure sustainability rating system currently being developed by ACEC, APWA, and ASCE that will help benchmark technical, environmental, and social responsibility elements of projects and firms.



### **Developing and Transitioning Future Leaders for Your Firm**

*Rod Hoffman, S&H Consulting LLC*

Small firm owners often struggle to identify and develop future leaders and partners/owners. This session will present practical steps a small firm can take to identify and assess talent and commitment, as well as steps to develop the leadership and management skills of those identified. Attendees will learn what traits they should be looking for, what resources are available to rapidly assess those traits, and what resources are available for further training and development.

The 2010 Fall Conference concludes with the ACEC/PAC Golf Tournament and Reception.

For details visit [www.acec.org](http://www.acec.org)