



EFCG

Environmental Financial
Consulting Group

2024 HR LEADERSHIP CONFERENCE

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

May 15-17, 2024

Four Seasons Hotel Nashville, TN



**Sponsorship
Partners**

25th ANNIVERSARY
CAREERSMITH

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WELCOME



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HR LEADERSHIP CONFERENCE

May 15-17, 2024




ABOUT EFCG

The Environmental Financial Consulting Group (EFCG) is the leading advisor to architecture, engineering, and consulting (AEC) firms. Its mission is to provide a data-driven and strategic edge to AEC firms to advance the innovation, sustainability, and success of the industry. We provide end-to-end, integrated solutions to support executive leaders with their most critical strategic and financial decisions.

In the last 35 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 200+ 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



500+
AEC Firms Advised

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

Mergers & Acquisitions



200+
M&A Transactions Advised On

- Sell- and Buy-Side Assignments
- Consultation on Capital Raises
- Market Creation for a Merger or Sale of a Firm
- Post-Merger Integration

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

1M+ 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.

Our 2023 program was approved for 12 credit hours from both the HRCI and from SHRM, a benefit unique to EFCG conferences. We anticipate credit approval for 2024 as well.



Dates & Times

Wednesday, May 15th 6:00 pm – 7:30 pm CT

Thursday, May 16th 8:30 am – 8:00 pm CT

Friday, May 17th 8:30 am – 2:30 pm CT

Welcome Reception

Time: Wednesday, May 15th 6:00 pm – 7:30 pm CT

Location: Four Seasons Hotel Nashville, Pool Lawn, 7th Floor
100 Demonbreun Street, Nashville, Tennessee 37201



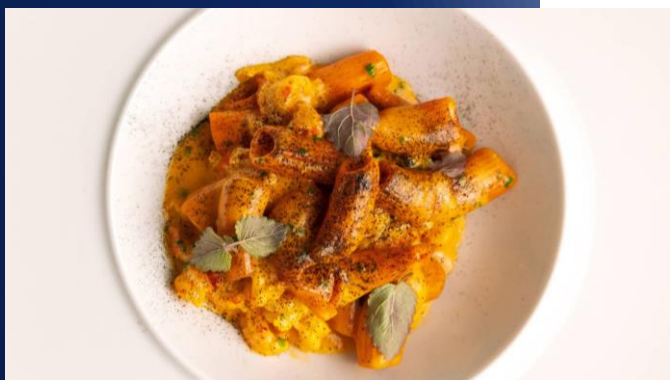
Enjoy fellowship, drinks, and hors d'oeuvres on the Four Seasons Pool Lawn to begin your 2024 EFCG HR Leadership Conference experience.

Conference Venue

Times: Thursday, May 16th 8:30 am – 8:00 pm CT

Friday, May 17th 8:30 am – 2:30 pm CT

Location: Four Seasons Hotel Nashville, Grand Ballroom, 5th Floor
100 Demonbreun Street, Nashville, Tennessee 37201



Thursday Evening Networking Reception & Dinner

Times: Thursday, May 16th 5:00 pm – 8:00 pm CT

Location: Ole Red, 300 Broadway, Nashville, Tennessee 37201

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 kthieme@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 Four Seasons Hotel Nashville

WELCOME



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HR LEADERSHIP CONFERENCE

May 15-17, 2024



SPONSORSHIP PARTNERS

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

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TRANSEARCH

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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25th
ANNIVERSARY
CAREERSMITH

TRANSEARCH
YOUR WORLD PARTNER IN EXECUTIVE SEARCH



(All Times in Central Time)

Wednesday, May 15, 2024

6:00 pm – 7:30 pm

Welcome Reception

Four Seasons Hotel Nashville Pool Lawn, 7th Floor, 100 Demonbreun Street, Nashville

Thursday, May 16, 2024

8:30 am – 9:00 am

Breakfast Meet-and-Greet

9:00 am – 10:15 am

Session 1: AEC Industry Overview: Critically Assessing the Data

10:15 am – 10:45 am

Morning Coffee Social

10:45 am – 11:45 am

Session 2: C-Suite Reactions: State of the Industry

12:00 pm – 1:00 pm

Lunch

1:00 pm – 1:45 pm

Session 3: Breakouts

3A: Paid Time Off Plans

3B: The DE&I Journey: Moving Forward

1:45 pm – 2:00 pm

Refresh Break

2:00 pm – 2:45 pm

Session 4: Addressing the Talent Shortage

2:45 pm – 3:00 pm

Afternoon Break

3:00 pm – 3:45 pm

Session 5: Roundtable Topics

5A: Pay Transparency

5B: Remote Work Policies & the 4-Day Work Week

5C: Recruitment & Retention Strategies

3:45 pm – 4:00 pm

Refresh Break

4:00 pm – 5:00 pm

Session 6: Effective Learning & Development Strategies: What Works, What Doesn't Work

5:00 pm – 8:00 pm

Evening Networking Reception & Dinner

Ole Red, 300 Broadway, Nashville

Friday, May 17, 2024

8:30 am – 9:00 am

Breakfast Reconnect

9:00 am – 10:00 am

Session 7: Leveraging Automation and AI Inside HR

10:00 am – 10:15 am

Refresh Break

10:15 am – 11:00 am

Session 8: Exploring Your Leadership Style

11:00 am – 11:30 pm

Morning Coffee Social

11:30 am – 12:20 pm

Session 9: Roundtable Topics by Firm Size

9A: Benefits Beyond Compensation

9B: Building the Future HR Team Structure

12:20 pm – 12:30 pm

Refresh Break

12:30 pm – 1:30 pm

Session 10: HR Leaders Lessons Learned

1:30 pm – 2:30 pm

Closing Coffee & Lunch Conversation



8:30 am – 9:00 am
Grand Ballroom Salon A &
Foyer, Fifth Floor

Breakfast Meet-and-Greet

9:00 am – 10:15 am
Grand Ballroom Salon C
Fifth Floor

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 2024 AEC Industry Survey — the most comprehensive proprietary dataset analyzing key financial and strategic metrics within the industry. During this presentation, Zofnass will provide the first look at the industry’s financial performance in 2023 and anticipations for 2024 and 2025 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

10:15 am – 10:45 am
Grand Ballroom Foyer
Fifth Floor

Morning Coffee Social

10:45 am – 11:45 am
Grand Ballroom Salon C
Fifth Floor

Session 2: C-Suite Reactions: State of the Industry

This session will bring together the perspectives of different c-suite executives as it covers what’s on the horizon for AEC firms and how today’s trends, challenges, and opportunities are impacting decisions in 2024 and beyond. This panelists will cover what they are focused on and what they are seeing for the future of our industry.

Moderator:

Julie Hasiba, EFCG Managing Partner, Talent & Compensation

Panelists:

Doug Bottorff, Chair & Chief Operating Officer, Shive-Hattery
Cendy Dodd, Chief Financial Officer, Barge Design
Ed Myszka, President, TRC Companies

12:00 pm – 1:00 pm
Grand Ballroom Salon A
& Foyer, Fifth Floor

Lunch



1:00 pm – 1:45 pm

Grand Ballroom Salon B
Fifth Floor

Session 3: Breakout Sessions

3A: Paid Time Off Plans

In the current competitive job market, providing appealing Paid Time Off (PTO) benefits is crucial for attracting and retaining talent. However, creating an effective plan requires navigating the delicate balance between meeting employees' work-life balance needs and ensuring operational efficiency and productivity. In this breakout session, Dimitri Milionis, Vice President of EFCG's Talent & Compensation Practice, will shed light on how AEC firms approach PTO planning based on EFCG's annual talent and compensation surveys. Following his insights, the discussion will open up to the group for an engaging dialogue.

Presenter:

Dimitri Milionis, EFCG Vice President, Talent & Compensation

Grand Ballroom Salon C
Fifth Floor

3B: The DE&I Journey: Moving Forward

Leveraging EFCG's proprietary data on Diversity, Equity, and Inclusion (DEI) and knowledge of what strategies firms are putting in place, this session will show this industry's progress over time and highlight effective approaches some firms have adopted to proactively drive positive change. After a short presentation, the session will turn into group discussions by firm size so you can hear what similarly-sized peers have done that's worked – and hasn't worked – to improve DEI efforts, giving you the chance to walk away with new ideas to take back to your firm.

Presenter:

Vishal Menon, EFCG Senior Associate, Advisory

1:45 pm – 2:00 pm
Grand Ballroom Foyer
Fifth Floor

Refresh Break

2:00 pm – 2:45 pm
Grand Ballroom Salon C
Fifth Floor

Session 4: Addressing the Talent Shortage

In this session, our panelists will offer a thorough exploration of 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 Milionis, EFCG Vice President, Talent & Compensation

Panelists:

Jim Horn, Chief Human Resources Officer, Ulteig
Christina Mazza, Talent Acquisition Manager, T&M Associates
Stacey McKavish, AVP, Recruiting & Regional HR Director, Dewberry
Asifa Samji, EVP, Chief People & Inclusion Officer, Stantec



2:45 pm – 3:00 pm
Grand Ballroom Foyer
Fifth Floor

Afternoon Break

3:00 pm – 3:45 pm

Session 5: Roundtable Topics

Grand Ballroom Salon A
Fifth Floor

5A: Pay Transparency

As more states enact laws mandating pay transparency in new job postings, AEC firms are increasingly embracing this practice throughout their organizations. During roundtable discussions, participants will delve into their firm’s existing pay transparency policies and the resulting impact. Additionally, they will explore potential policy adjustments, seeking input from fellow participants on essential factors to consider when making decisions.

Topic Facilitators:

Ryan Del Grosso, EFCG Associate, Advisory
William Onyach, EFCG Analyst, Advisory

Grand Ballroom Salon B
Fifth Floor

5B: Remote Work Policies & the 4-Day Work Week

In this session, the group will exchange ideas on how to address the various challenges related to hybrid and remote work settings. These challenges encompass ensuring consistent high-quality client work, acquiring great talent, maintaining employee engagement, identifying pathways for professional development (including certifications and learning opportunities), and even encouraging managers and directors to pay adequate attention to their teams — even in virtual interactions. Roundtable attendees will walk away with new ideas and a fresh perspective on what strategy to implement and approach to take.

Topic Facilitators:

Marcus Quigley, EFCG Partner, Technology & Innovation
Clay Han, EFCG Senior Analyst, Advisory

Grand Ballroom Salon C
Fifth Floor

5C: Recruitment & Retention Strategies

Talent scarcity remains as the biggest constraint to growth in the AEC Industry. Prioritizing not only talent acquisition but also talent retention is central to a firm’s success. During this roundtable discussion, participants will have the opportunity to share and learn from each other’s practices and lessons. Together, they will explore next steps in their continuously evolving talent strategies.

Topic Facilitators:

Rebecca Zofnass, EFCG Managing Partner, Strategy & Corporate Finance
Julie Hasiba, EFCG Managing Partner, Talent & Compensation

3:45 pm – 4:00 pm
Grand Ballroom Foyer
Fifth Floor

Refresh Break



(All Times in Central Time)

Thursday, May 16, 2024

4:00 pm – 5:00 pm
Grand Ballroom Salon C
Fifth Floor

Session 6: Effective Learning & Development Strategies: What Works, What Doesn't Work

As the AEC Industry transitions toward hybrid work models, organizations are reevaluating their learning and development strategies. In an upcoming session, panelists will discuss successful tactics, share insights, and explore the role of top leadership. Additionally, they will delve into addressing employee upward mobility based on factors such as firm size, footprint, and future talent requirements. The hybrid work environment presents unique challenges, but innovative learning approaches can help organizations adapt to these changing times and support their workforce effectively.

Moderator:

Vishal Menon, EFCG Senior Associate, Advisory

Panelists:

Julie Johnson, Vice President, Human Resources, VHB

Mischele Lindley, Director, Employee Development, Terracon

Brad Rowe, Senior Vice President, People & Culture, SSOE

Matthew Tucker, Head of Talent Development, Hanson Professional Services

5:00 pm – 8:00 pm

Evening Networking Reception & Dinner

Ole Red, 300 Broadway, Nashville, Tennessee 37201

Join us for inviting dinner, drinks, and conversation with colleagues as you take in gorgeous panoramic views of Nashville on Ole Red's rooftop. Named after Blake Shelton's song "Ol' Red," and owned by the Ryman Hospitality Group as part of its Opry Entertainment division, this performance venue has hosted top country artists including Blake Shelton himself and even NBC's The Voice.



Photographs from 2022 and 2023 EFCG Conferences by Dylan Crossley Photo, Rebecca Slezak Photography, and EFCG



8:30 am – 9:00 am
Grand Ballroom Salon A &
Foyer, Fifth Floor

Breakfast Reconnect

9:00 am – 10:00 am
Grand Ballroom Salon C
Fifth Floor

Session 7: Leveraging Automation and AI Inside HR

As automation and AI are becoming rapidly integrated into our industry, the intersection of technology and HR presents exciting opportunities. By harnessing automation and AI tools, the HR team can streamline processes, enhance decision-making, and unlock heightened productivity. Marcus Quigley, Partner of EFCG’s Technology & Innovation Practice, will impart ideas about the trajectory of AI and its implications for both the HR function and the entire firm. Joining him will be forward-thinking panelists that will delve into how they are thinking through practical applications of these tools to stay ahead of the trend to realize the benefits.

Presenter and Moderator:

Marcus Quigley, EFCG Partner, Technology & Innovation

Panelists:

April Kozubal, Chief Human Resources Officer, Verdantas
Heather Sanchez, Chief People Officer, Jensen Hughes
Kathleen Welter, Vice President, Human Resources, Woodard & Curran

10:00 am – 10:15 am
Grand Ballroom Foyer
Fifth Floor

Refresh Break

10:15 am – 11:00 am
Grand Ballroom Salon C
Fifth Floor

Session 8: Exploring Your Leadership Style

Providing time for self-reflection, this session will spend quality time on you, the HR leader. In an open and candid conversation amongst peers, panelists will explore the various tools they employ to continuously revisit their leadership styles. These speakers will emphasize the strategies they adopt—both significant and subtle—to carve out moments for introspection and to reconnect with what truly matters for their own professional growth and for their teams, even conveying what they’ve recently learned about their priorities because of those deserved moments. Attendees will have a few minutes at the end of this candid exchange to deliberate on practical ways to create space for focused reflection on their leadership style and priorities.

Presenter and Moderator:

Julie Hasiba, EFCG Managing Partner, Talent & Compensation

Panelists:

Stacey Dolden, Chief People Officer, SCS Engineers
Jennifer Gillilan, Vice President, Human Resources, Enercon
Maria C. Sepulveda, Director, Human Resources, Altamira

11:00 am – 11:30 am
Grand Ballroom Foyer
Fifth Floor

Morning Coffee Social



11:30 am – 12:20 pm

Grand Ballroom Salon A
Fifth Floor

Session 9: Roundtable Topics by Firm Size

9A: Benefits Beyond Compensation

In today's dynamic work landscape, employee satisfaction extends beyond mere monetary rewards. While compensation remains crucial, it is essential to consider a more holistic approach to the employee total rewards and benefits package, recognizing that, sometimes, it's the small benefits that have the greatest impact. In this roundtable discussion by firm size, groups will contemplate the elements that go beyond compensation such as flexible work arrangements and comprehensive wellness programs, discussing what seems to make a difference at their firms. The goal of these roundtable groups is to learn from one another to keep great talent within AEC.

Topic Leaders:

Dimitri Milionis, EFCG Vice President, Talent & Compensation
Ryan Del Grosso, EFCG Associate, Advisory
Addy Orcutt, EFCG Analyst, Advisory

Grand Ballroom Salon B
Fifth Floor

9B: Building the Future HR Team Structure

The AEC Industry is undergoing profound changes that require the HR leader and their team to evolve. How can firms design their HR team's organizational structure to meet future challenges and opportunities? In groups by firm size, participants will contemplate how their team's roles and capabilities will change in the next 5 years, and what that means for their team's structure and talent pipeline.

Topic Leaders:

Julie Hasiba, EFCG Managing Partner, Talent & Compensation
William Onyach, EFCG Analyst, Advisory
Kim Thieme, EFCG Office Manager

12:20 pm – 12:30 pm
Grand Ballroom Foyer
Fifth Floor

Refresh Break

12:30 pm – 1:30 pm
Grand Ballroom Salon C
Fifth Floor

Session 10: 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:

Katie Murphy, Vice President, Human Resources, GZA GeoEnvironmental
Jacqueline Opal, Senior Vice President, Chief People Officer, STV
Scott Wilson, Director, Global Human Resources, Ramboll

1:30 pm – 2:30 pm
Grand Ballroom Salon A
& Foyer, Fifth Floor

Closing Coffee Conversation & Lunch



Nashville Activities

Eat...

Great Food

Bourbon Steak | Timeless Classic Dishes
201 8th Avenue S, Nashville, TN 37203

Jeff Ruby's Steakhouse | Local Favorite
300 4^o Avenue N, Nashville, TN 37203

Yolan | Polished-Style Italian
403 4th Avenue S, Nashville, TN 37203

Etch | Eclectic Dining, Seafood
303 Demonbreun St., Nashville, TN 37203

Hampton Social | Coastal Inspired American
201 1st Avenue, Nashville, TN 37203

The Rutledge | Modern American Grille
151 1st Avenue, Nashville, 37203

Boqueria | Barcelona-Style Tapas Bar
5005 Broadway Place, Nashville, TN 37203

Southern Staples

Husk | Creative Grill-Fired Cuisine
37 Rutledge St., Nashville, TN 37203

The Farm House | Farm-Fresh Southern
210 Almond St., Nashville, TN 37203

Martin's Bar-B-Que Joint | Pit-cooked
410 4th Avenue S, Nashville, TN 37203

Prince's Hot Chicken | Nashville's Original
505 Broadway, Nashville, TN 37201

Hattie B's | A Music City Staple
5069 Broadway Place, Nashville, TN 37201



Dance and Drink...

Honky Tonks

Acme Feed & Seed | Live Music and Dancing
101 Broadway, Nashville, TN 37201

Tootsies Orchid Lounge | Music and Dancing
422 Broadway, Nashville, TN 37203

Robert's Western World | Country Music & Food
416B Broadway, Nashville, TN 37203

Bars & Cocktails

Mimo Bar & Restaurant | Food, Cocktails, Live Music
Four Seasons Nashville

Red Phone Booth | Pizza, Cocktails, Cigars
136 Rosa L. Parks Blvd., Nashville, TN 37203

Pushing Daisies | Cocktails
570 Broadway, Nashville, TN 37203

Skull's Rainbow Room | Speakeasy Lounge & Restaurant
222 Printers Alley, Nashville, TN 37203

L27 Rooftop Lounge | Lounge and Bar
807 Clark Place, Nashville, TN 37203

Four Walls | Intimate Cocktail Bar
Hidden within the Joseph
405 4th Avenue South, Nashville, TN 37201

Extending Your Stay?

Grand Ole Opry House
Ryman Auditorium
The Listening Room Cafe
Country Music Hall of Fame
Johnny Cash Museum
Music City Walk of Fame
Nashville Segway Tour

Best Things to do in Nashville