



EFCG

Environmental Financial
Consulting Group

2024 RISING LEADERS CONFERENCE

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

January 25-26, 2024

Convene One Liberty Plaza | 1 Liberty St, New York, NY



WELCOME

RISING LEADERS CONFERENCE

January 25-26, 2024



EFCG
Environmental Financial
Consulting Group

EFCG's mission is to provide a data-driven and strategic edge to architecture, engineering, and consulting (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 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 190+ 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.

About the Rising Leaders Event

This event welcomes the top talent from 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 25th 9:00 am – 7:30 pm ET
Friday, January 26th 9:00 am – 2:00 pm ET

Venue Location

Convene One Liberty Plaza
1 Liberty Street, New York, New York 10006
Private Event Entrance: 165 Broadway, on the corner of Cortlandt Street and Broadway, opposite The Gap. The name Convene is above the entrance.
Bring a government-issued photo ID.

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 2023 EFCG Conferences
By Dylan Crossley Photo, Rebecca Slezak
Photography, and EFCG



(All Times in Eastern Time)

Thursday, January 25, 2024

9:00 am – 9:30 am

Breakfast Meet-and-Greet

9:30 am – 11:00 am

Session 1: AEC Industry Overview

11:00 am – 11:30 am

Morning Coffee Social

11:30 am – 12:20 pm

Session 2: Tech Trends and Understanding the New AI Landscape

12:30 pm – 1:30 pm

Lunch

1:30 pm – 2:15 pm

Session 3: Breakout Sessions

3A: Sustainability and ESG: The Intersection of Profit and Purpose

3B: Total Rewards Trends & Employee Experience

2:15 pm – 2:30 pm

Refresh Break

2:30 pm – 3:15 pm

Session 4: CEO and CFO Lessons Learned

Panelist Speakers:

Greg Kelly, CEO, STV

Chris Nelson, CFO, McKim & Creed

3:15 pm – 3:45 pm

Afternoon Break

3:45 pm – 4:45 pm

Session 5: Defining Your Leadership Style

5:15 pm – 7:30 pm

Evening Networking Reception & Dinner

Friday, January 26, 2024

9:00 am – 9:30 am

Breakfast Reconnect

9:30 am – 10:30 am

Session 6: Today's Major M&A Trends and What's Expected for 2024

10:30 am – 11:00 am

Morning Coffee Social

11:00 am – 11:45 am

Session 7: Advancing Diversity, Equity, and Inclusion at Your Firm

12:00 pm – 12:50 pm

Session 8: How to Plan Your Career Path and Advance Your Career

Panelist Speakers:

Gwen Perez, CFO, Freese and Nichols

Michelle White, CEO, Harris & Associates

1:00 pm – 2:00 pm

Closing Coffee Conversation & Lunch



Photographs from 2022 EFCG CEO Conference
By EFCG



(All Times in Eastern Time)

Thursday, January 25, 2024

9:00 am – 9:30 am

Breakfast Meet-and-Greet

9:30 am – 11:00 am

Session 1: AEC Industry Overview

As disruptive trends such as AI and emerging business models come to the forefront, one thing remains true for the AEC Industry: what drove success in the past is different from what will drive success in the future. Managing Partner Rebecca Zofnass will disclose the results of the latest EFCG CEO Survey – the most extensive, proprietary industry data set available analyzing the industry’s key financial and strategic metrics – and reflect on how AEC firms are reassessing their corporate strategies and market positions to stay ahead.

Presenter: Rebecca Zofnass, EFCG Managing Partner, Strategy & Corporate Finance

11:00 am – 11:30 am

Morning Coffee Social

11:30 am – 12:20 pm

Session 2: Tech Trends and Understanding the New AI Landscape

One of the fastest-growing technologies in the AEC industry, AI, is opening a wealth of opportunities for firms. AI-driven tools in the AEC industry hold great promise for streamlining workflows, fostering collaboration to cultivate innovation, automating routine tasks, and identifying and analyzing complex patterns, leading to more accurate predictions and optimized designs. In this session, EFCG’s Technology Advisory Practice Lead Marcus Quigley will explore how AEC firms are leaning into and capitalizing on their AI investments and other mega-tech trends to drive meaningful forward progress.

Moderator: Marcus Quigley, EFCG Partner, Technology & Innovation

12:30 pm – 1:30 pm

Lunch



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



**Corporate Finance
& Benchmarking**



**M&A
Advisory**



**Sustainability
& ESG**



**Talent &
Compensation**



**Technology
& Innovation**



(All Times in Eastern Time)

Thursday, January 25, 2024

1:30 pm – 2:15 pm

Session 3: Breakout Sessions

3A: Sustainability and ESG: The Intersection of Profit and Purpose

The integration of Environmental, Social, and Governance (ESG) factors into business practices is becoming increasingly crucial for AEC firms seeking a competitive edge. This session will focus on the latest ESG trends impacting the AEC industry and explore the primary drivers accelerating adoption, including client demand, talent attraction, and both existing and upcoming regulations. Specifically tailored for the next generation of firm leaders, the session will delve into how AEC firms are responding to ESG reporting requests. It will also cover the frameworks being implemented, and discuss the significant effects on organizational structure, strategy, revenue, profits, and firm valuations.

Presenter: Clay Han, EFCG Advisory Consultant

3B: Total Rewards Trends & The Impact on Employee Experience, Recruitment, and Retention

Using data from EFCG's annual talent and compensation surveys and insights from our recent Total Rewards Forum, the session will explore what total rewards strategies firms are employing as a result of the recent increased compensation demands. Dimitri Milionis, Vice President of EFCG's Talent & Compensation Practice, will reflect on the impact those strategies will have on the employee experience and the firm's ability to successfully recruit and retain talent. Attendees will then have an opportunity to discuss their firm's experience with other attendees in groups, so you can learn from one another's best practices and lessons learned.

Presenter: Dimitri Milionis, EFCG Vice President, Talent & Compensation Strategy

2:15 pm – 2:30 pm

Refresh Break

2:30 pm – 3:15 pm

Session 4: CEO and CFO Lessons Learned

During this coffee-chat style session, prominent leaders in the industry, STV's CEO Greg Kelly and McKim & Creed's CFO Chris Nelson, will join us to share their insights and lessons learned from their successful careers.

Moderator: Jessica Zofnass Barclay, EFCG Managing Partner, M&A

Panelist Speakers:

Greg Kelly, CEO, STV

Chris Nelson, CFO, McKim & Creed

3:15 pm – 3:45 pm

Afternoon Break



(All Times in Eastern Time)

Thursday, January 25, 2024

3:45 pm – 4:45 pm

Session 5: Defining Your Leadership Style

This session will provide a moment of self-reflection on your leadership style and how to turn it into an invaluable tool. EFCG Managing Partner Julie Hasiba will dive into four core leadership styles and talk through the role they each play depending on the circumstance. In a small group discussion, you'll then have the chance to evaluate how you lead, how you can adapt your leadership style to best serve each situation, and what additional leadership styles you may want to build towards to best develop your holistic leadership approach.

Presenter: Julie Hasiba, EFCG Managing Partner, Talent & Compensation

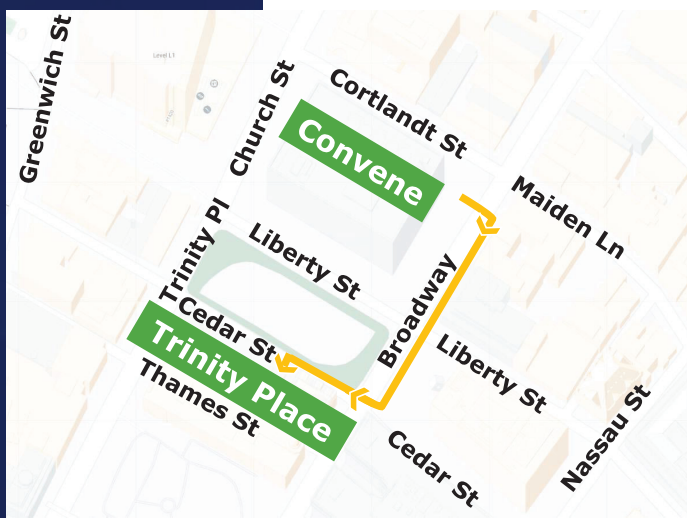
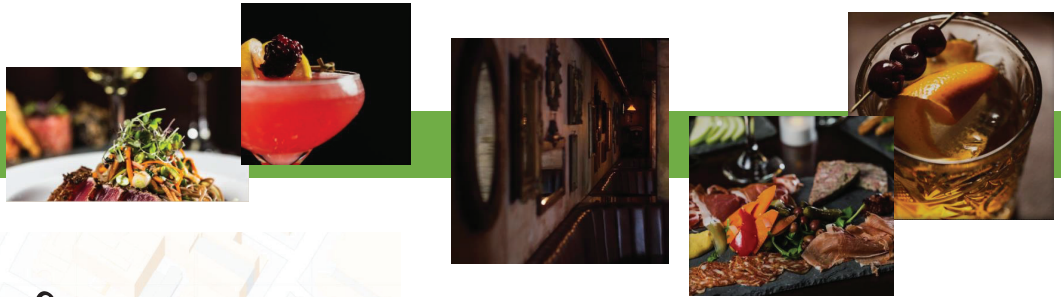
5:15 pm – 7:30 pm

Evening Networking Reception & Dinner



115 Broadway
New York, NY 10006

Join us for dinner, drinks, and conversation with colleagues at the inviting Trinity Place. An established restaurant & bar with hospitality in its roots and soaked in NYC history. Originally a bank vault built at the turn of the century and owned by Andrew Carnegie, this fine dining experience brings contemporary touches to a historic site. The chef creates new and innovative dishes, serving only the best quality cuisine with seasonal ingredients from local producers.



Directions: Convene to Trinity Place

When exiting Convene onto Broadway, take a right on Broadway to head southwest for two blocks. Then take a right on Cedar Street, heading west. The entrance to Trinity Place is on Cedar Street, across from the park.



(All Times in Eastern Time)

Friday, January 26, 2024

9:00 am – 9:30 am

Breakfast Reconnect

9:30 am – 10:30 am

Session 6: Today’s Major M&A Trends and What’s Expected for 2024

In today’s economic environment, investors are aggressively seeking opportunities to put capital to work in the AEC Industry. Leveraging EFCG’s proprietary M&A database and advisory work, Managing Partner Jessica Zofnass Barclay and Senior Vice President Trevor Casey will highlight current M&A trends, discuss core investment themes, and provide insight into where the market is heading in 2024.

Presenters:

Jessica Zofnass Barclay, EFCG Managing Partner, M&A
Trevor Casey, EFCG Senior Vice President, M&A

10:30 am – 11:00 am

Morning Coffee Social

11:00 am – 11:45 am

Session 7: Advancing Diversity, Equity, and Inclusion at Your Firm

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 Consultant, Strategy & Corporate Finance

12:00 pm – 12:50 pm

Session 8: How to Plan Your Career Path and Advance Your Career

Reflecting on what has made their career paths possible, highly accomplished professionals Michelle White and Gwen Perez will join a conversation with Julie Hasiba to share what has worked for them to get to where they are today. Perez has spent her career in finance. A trusted advisor to the Freese and Nichols C-Suite for many years serving as Controller and CAO, Perez is now stepping into the CFO role at the firm. Meanwhile, White’s breadth of experience from Chief People Officer (CPO) to COO has now uniquely prepared her for her newest position as CEO. Both speakers will share actionable steps that you can take to shape your own career, no matter the path you take. As the conference-closing session, this discussion will provide you with new ideas and perspectives to reflect on as you see continued success as the future of your firm.

Moderator: Julie Hasiba, EFCG Managing Partner, Talent & Compensation

Panelist Speakers:

Gwen Perez, CFO, Freese and Nichols
Michelle White, CEO, Harris & Associates

1:00 pm – 2:00 pm

Closing Coffee Conversation & Lunch

2024 Rising Leaders Conference

For Architecture, Engineering, and Consulting Firms

Event Logistics

Venue Location

Convene One Liberty Plaza, 1 Liberty Street, New York, New York 10006

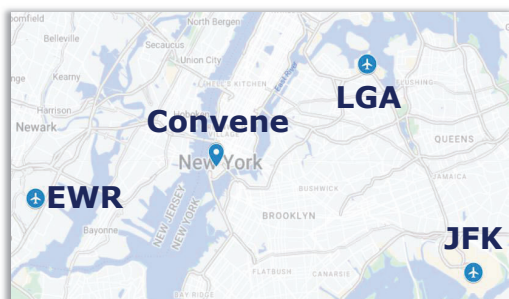
Hotel Options

Hotel	Walk to Convene	Nightly Pricing (as of 12/18/2023)
Millennium Hilton New York Downtown 55 Church Street, New York, New York 10007 (212) 693-2001	4 minutes	\$140 - \$220
Aloft Manhattan Downtown – Financial District 49-53 Ann Street, New York, New York 10038 (212) 513-0003	6 minutes	\$100 - \$200
The Beekman, A Thompson Hotel 123 Nassau Street, New York, New York 10038 (212) 233-2300	6 minutes	\$380 - \$550
Four Seasons New York Downtown 27 Barclay St, New York, New York 10007 (646) 880-1999	6 minutes	\$790+

Transportation to and From Airport

Airport	Outside Rush Hour	Rush Hour
Newark Liberty International (EWR)	40-minute drive	60-minute drive
LaGuardia (LGA)	45-minute drive	60-minute drive
John F. Kennedy (JFK) <i>Allow additional time through airport</i>	75-minute drive	120-minute drive

Venue Location to Airport Options



Venue Location to Hotel Options

