



Engineering America's Recovery

October 7-10, 2009

La Quinta Resort, Palm Springs, CA

EDUCATION SESSIONS

WEDNESDAY, October 7, 2009

2:00 pm-5:00 pm

CEO Roundtables

Executives are invited to attend these engaging group discussions led by CEOs and senior principals. These idea sharing sessions are consistently highly ranked by attendees and topics include profitability, business practices, liability, human resources, 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).

7:00 – 9:00 pm



CASE Convocation Banquet - The Engineering Expert Witness: When Things Aren't Black & White

Samuel Muir, Esq., Collins Collins Muir & Stewart, LLP

Sam will be discussing how engineers are hurting their own professions by taking on malpractice claims as experts where the facts are not always black and white.

THURSDAY, October 8, 2009

8:00 – 9:00 am

Opening General Session: Economic and Political Outlook with Vicente Fox, former President of Mexico

9:15 – 10:30 am

Retrofit or Reconstruct? A New Approach: Use of Microsimulation to Justify Retrofitting Freeways to Add Managed Lanes

David Stroud, PE, AICP, RS&H

Many metropolitan areas are using travel demand management techniques rather than increasing capacity to ease congestion, although implementing managed lanes on an existing Interstate system several design, operation and safety issues. This session looks at how a recent innovative application of microsimulation modeling on the 95 Express managed lanes project in Florida has proven invaluable in addressing these issues.

Integrated Project Delivery Criteria Consulting: A New Business Opportunity

David Shelton, Federal Agency Consultant; Thomas Coleman, Consultant

Criteria Consulting (CC) services offers a potentially profitable new market for A/E firms as the demand for Integrated Project Delivery (IPD) expands. Many firms already have the technical skills to provide CC services, and this session will look at CC's role in establishing acquisition strategy, developing project performance criteria, facilitating project definition, structuring source selection and team evaluation criteria, and implementing compliance auditing.

Sources of Capital: Finance and Your Firm

Robert vanArsdall, XL Design Professional

Of the three sources of capital, equity capital is the least used in the consulting design world. This session explains the three sources of capital and the consequences of each to the firm, as well as why financing the firm purely out of operating capital does not always lead to optimal business practices.



Risks Associated with Design Build

Stephan F. Andrews, Esq., Vandevender and Black; Edward W. Pence, Jr., Stroud, Pence and Associates, LTD

The Design-Build project delivery system is becoming more popular, not only with private Owners but with federal, state and local government. The risks associated with this delivery system can be very different than for a conventional design-bid-build project. This session will explore these risks, look at some of the latest trends in claims, and provide practical solutions for the A/E to better manage them.

9:15 am – 12:15 pm

NEW! Expanded Federal Contracting and Compliance Workshop

Part I: Basic FAR Compliance and FAR Overhead Principles in A Time of Increased Regulation

Julian Rosenberg, HDR, Inc.; Lynda Konomos, HNTB Corporation

Federal Acquisition Regulations (FAR) govern all work engineering firms do for federal, state and local government, but making money on a contract governed by FAR can be impossible if a company does not understand the implications of non-compliance with the myriad rules and regulations. This session will explore FAR Allowability, FAR Cost Principles, and Basic FAR Compliance to keep your firm out of trouble and profitable.

Part II: New Edition of AASHTO's Uniform Audit and Accounting Guide – Implications and Lessons Learned

Joe Dailey, FHWA; Jerry Jones, AASHTO, MI DoT; Nick Ellis, Kimley Horn; David Oates, Oates & Associates; T. Wayne Owens, Deemer, Dana & Froehle, LLP

Learn about the latest iteration of AASHTO's new Audit Guide from the people who wrote it. What does it mean for your firm and your business? These experts provide guidance for being in compliance.

11:00 am – 12:15 pm

An Innovative New Market: Municipal Solid Waste Management and Renewable Energy - Convergence and Sustainability

Thomas Sprehe, KCI Technologies, Inc.

Large centralized waste-to-energy projects have virtually stagnated over the last two decades because the energy consumed in transportation is too high. KCI has created a business enterprise (Meta Energy) based on small scale solid waste management with energy recovery from the non-recyclable fraction of MSW. Hear how Meta Energy is actively working with new concepts and new technology in a novel waste treatment process to produce sustainable energy from Refuse Derived Fuel.

Selection and Uses of Web-based Project Management

Steven Farmer, RS&H

Today's project managers are faced with a host of modern-day challenges: an online community where instant answers to queries are expected, project teams scattered across states and sometimes oceans, forced to complete what seem like endless progress reports, cash flows and budget updates. Web-based project management systems can solve many of these issues, but tailoring the system to the needs of your company or project is vital to success.

How to Get EVERYONE in Your Firm Using the Trade Secrets of the Best Business Developers

David A. Stone, Stone & Company

An engineering practice is sustained on great relationships, and that requires different social and communication skills than technical expertise does. This eye-opening session will outline a non-traditional approach to help you match the strengths of every individual in your firm to the most successful business developers' world-class practices and techniques. With an emphasis on techniques that will work for YOU and YOUR firm, this program is your personal coaching session, leading to business development success.



Did I Say That!? Electronic Communication, Backup and Retention in the Engineering Practice

Eric L. Singer, Ice Miller, LLP; Karen Erger, Holmes Murphy and Associates; Terence M. Lindsay, Lindsay & Associates, Inc.

Structural engineer Terry Lindsay joins attorneys Eric Singer and Karen Erger for an open-format roundtable discussion of pitfalls, policies, advantages and challenges presented by electronic communication. From liability and claims management to sound business practice, the panel will discuss the use, contents, storage, back up and retention of electronic mail, data, calculations and software in the engineer's practice, with a lively discussion to follow.

12:30 – 2:15 pm

Keynote Luncheon: Mission to Saturn with David Doody, Cassini Mission Support Services Office, NASA

Flight Operations Lead Engineer for the Cassini Mission, David Doody will describe the complex spacecraft and share some of its stunning discoveries from Saturn and its moons.

2:30 – 3:45 pm

Industry Trends – Expected Top Markets for 2010 Include Sustainability, Health Care and Water Projects

Ron Ewing, Dewberry, Inc; Terry Bennett, AutoDesk, Inc.

ACEC's comprehensive Industry Trends Survey predicts coming market opportunities in green infrastructure and health care facilities for 2010. The new survey report, co-sponsored by Autodesk, sees emerging market demand as driving the need for projects in specific market sectors and reveals firms' responses to current business challenges, such as flattening of salaries and innovative company practices to boost efficiencies.

ESOPs and M&A Transactions for the *Recovery Decade*

Colvin Matheson, Matheson Financial Advisors, Inc.

Despite the current economic downturn, engineering firm ownership and leadership transition remains a significant strategic issue all firms face: transactions still need to occur and long range plans call for growth and the need for exit strategies. This session will look at different approaches to ownership transition – from M&As to ESOPs – and will enhance awareness of firm leaders concerning these complex tools of corporate finance and ownership transition



Achieving Neighborhood Sustainability with LEED®

Ted Bardacke, Green Urbanism Program, Global Green USA

This session will explain how the LEED-ND rating system combines the principles of smart growth, urbanism, and green building into the first national standard for neighborhood design. Particular emphasis will be put on infrastructure design strategies in the LEED-ND system where engineers will play a key role in project success.



Getting Your Project Off on the Right Foot - and Finishing It Right

Stacy Bartoletti, Degenkolb Engineers; Brent White, ARW Engineers; Corey Matsuoka, SSFM International, Inc.

The Toolkit Committee of CASE is continually developing tools to help Structural Engineers manage risk associated with doing business. During this presentation, three new tools will be discussed: Project Kick Off Meeting Agenda, Construction Administration Log and Sample Correspondence Letters.

NAECE: Using Social Networking Media

John Zimmerman, eRocketFuel.com

Facebook, LinkedIn, Twitter. The ever-expanding array of social networking options can be confusing. What does each do? How do they differ? Which is best for ‘social’ applications and which for business? This session will offer an overview of social media, appropriate uses of and approaches to each, and how to integrate social media with regular email and your website.

4:15 – 5:30 pm

The Future of Bridge Inspection – Ensuring Safe Infrastructure

Eric Thorkildsen, Greenman-Pedersen, Inc.

Bridge inspections are federally mandated and immune to recent funding issues and so offer a potentially profitable market opportunity. This session will explore qualifications of bridge inspectors, program manager, and Quality Assurance/Control professionals; types of non-destructive testing used in bridge inspections; differentiating between structurally deficient bridges and functionally obsolete bridges; and keys to success for a consultant-run bridge inspection program.

Controversy in Engineering Education: Colorado’s Continuing Competency Requirements and NCEES’ Bachelors + Masters-or-Equivalent (MoE)

Mark Hamouz, LONCO, Inc; Dr. David L. Whitman, PE, University of Wyoming, NCEES; Jeffrey Beard, ACEC

The state of Colorado recently shifted from ‘continuing education’ requirements for maintaining architect licenses to ‘continuing competency’ requirements, and there is discussion of making this move for engineers and surveyors. NCEES recently reconfirmed its Bachelors + 30 requirements that are expected to take effect in 2020, and announced a more expansive Bachelors + “MOE” (Masters or Equivalent) approach to allow for an array of continuing education options to meet minimum standards for licensing eligibility. Join this lively discussion about what these changes – and others happening nationwide – have for the industry and your firm.

Climate Legislation: Game-Changing Business Opportunities

Howard Ellis, PhD, QEP, Enviroplan Consulting; John F. Henz, C.C.M., Atmospheric Science Group, HDR

This session will focus on the potential business opportunities for engineering consulting firms as a result of federal carbon reduction legislation, including carbon emission inventories and certification and sequestration and offset identification. It will focus on the engineering considerations involved in climate adaptation as businesses, utilities and municipalities prepare for the effects of increasing temperatures and changing weather patterns on infrastructure and operations.



The Design Professionals’ Risk During Construction

David Corkum, Esq., Donovan Hatem; Nils Ericson III, The Di Salvo Ericson Group

Construction and completion phases of a project present unique risks for design professionals. This roundtable discussion explores the risks, responsibilities, and potential liability for design professionals during the construction phase; discusses appropriate strategies for minimizing risk; and addresses the emerging trend of FCA litigation and the

evolving expectation of BIM as it relates to construction phase services by design professionals.

The Perfect Board – Making the Most of Your Nonprofit’s Volunteers

Calvin K. Clemons, CAE, CMP, Catharsis, LLC

Participants will learn how to maximize effective board governance while strengthening interactive relationships, including board roles and responsibilities, financial management and staff relationships, as well as board development through leadership strategies and understanding generational differences. Session participants will gain an understanding of board planning, policy making and brand identity of the organization.

FRIDAY, October 9, 2009

8:30 – 9:45 am

Megaprojects: Rising to the Challenges and Managing the Risks of This

Increasingly Common Project Approach

David Hatem, Esq. and David H. Corkum, Esq., Donovan Hatem; David Caiden, PE, Arup; Geoffrey Fosbrook, AECOM

Many of the infrastructure projects currently being planned are considered Megaprojects located in the heart of urban areas, which involve multiple designers and multiple prime contractors and often span more than a decade from planning to completion. This session will explore the range of issues associated with the planning, management, design and construction of these Megaprojects.

Creating High Performers – Now More Than Ever, It's Your Job!

Scott Braley, Braley Consulting & Training

Effectively creating high performers for today and tomorrow can mean improved project delivery success and smooth transitions in leadership and ownership. This session will focus on best practices and proven techniques to help Principals fulfill their responsibility to identify and prepare the next generation of leaders and owners while ensuring the current success of the firm.

BIM for Bosses – What You Need to Know to Compete

Eric Wing, C&S Companies

A current industry FAQ: “What results should I expect to see from BIM applications that we just bought, or are about to buy?” This session will explain the end goal of using BIM in your firm, the processes needed for a seamless implementation, and the hard facts in getting there, and “bosses” will be given a realistic view of what to expect, and what not to expect, once BIM is up and running.

Rail Transit Benefits Sustainable Infrastructure and Land Development – New Markets in a Changed Economy

Randall D. Tardy PE, DBIA, SLDI, Bentley Systems Inc.

Public transit has been lacking in the U.S. since WWII, but high energy costs and the green movement will elevate transit in domestic importance. Europe and Asia are shining examples of practical rail transit and they show how rail travel provides a cost effective,

clean energy alternative with potential green advantages. This presentation will offer domestic and international examples of this contribution in rail communities.



Should I Really Sign that Form?

James Schwartz, Esq., Beazley Insurance ; Timothy Corbett, SmartRisk; Patrick A. Craig, Esq. and Brian Stewart, Esq., Collins Collins Muir & Stewart, LLP

Being “forced” to sign contracts prepared by others, while a reality, presents substantial exposure to design firms which increases in a down economy. This program, presented by insurance and claim professionals and attorneys who have spent collective decades in the “trenches” of construction litigation, will focus on good contract and risk management practices.

10:15 – 11:30 am

Alternative Financing for Transportation Projects: PPPs and Other Innovative Financing Solutions

Margo Bennett, Nossaman LLP; Lisa Fenner, KPMG

With federal, state, and local government revenue sources drying up, more and more project teams are looking to Public-Private Partnerships, private financing, and other innovative funding solutions for needed transportation projects. This session will explore the latest trends in transportation financing and what the coming years are likely to bring.

Agents, Underwriters and Insurance Applications - A Peek Behind the Insurance Curtain - Part II

Albert Rabasca, XL Insurance; Jeff Cavignac, Cavignac & Associates Insurance Brokers

This session discusses the process of professional liability insurance procurement, from the initial steps of choosing your broker through the final decision of choosing your carrier, considering both QBS and cost, as well as the ramifications of specific questions on the application relative to underwriting considerations.

Emerging Opportunities for Comprehensive Sustainability Auditing

Jon Roberts, PhD, LEED AP, CTG Energetics, Inc.

This session offers an overview of emerging drivers now pushing building owners/operators, campuses, cities, corporations, and others toward more detailed sustainability information about their facilities, which provides opportunities for new business, and will describe different approaches to sustainability auditing. The session will also introduce follow-up activities that build upon sustainability auditing.

The Firm of the Future: Big Picture Trends Shaping the Future of Engineering Firms

Ray Kogan, Kogan & Company

Yogi Berra said “It’s tough to make predictions, especially about the future.” Heeding his wisdom, it is essential that leaders of engineering firms understand what the future holds in order to navigate their firms through these tumultuous times. By examining the major forces driving the business climate for engineers, participants in this session will become better equipped to anticipate trends, analyze future prospects, and position their firms to leverage market directions.



Issues Facing Surveyors and Engineers in the Land Development Market

Blake Murillo, Psomas; Edward F. Garrigan, C. T. Male Associates, P.C.

The COPS and Land Development Coalition leadership will lead a discussion on major topics and critical issues facing both professions and the industry.

11:45 am – 1:45 pm

Awards Luncheon Honoring 2009 Award of Merit Recipient Ralph Peterson, Chairman Emeritus, CH2M Hill

2:00 – 5:00 pm

Transforming Engineering Business: Strategy, Innovation, And Change in Today's Turbulent Environment

David Aitken, Aitken Leadership Group; Rod Hoffman, S&H Consulting; Kyle Davy, Kyle V. Davy Consulting

Today's turbulent environment challenges the adaptive capacity of firms and leaders. Can your firm identify and deploy innovative blue ocean strategies to escape existing market constraints? Can leaders navigate the cauldron of change to tap the potential for creativity that emerges in times of uncertainty? Will you mobilize your staff to step up and tackle today's toughest challenges and create innovations capable of reshaping our work and our world? Come join SEI alumni and other executives in this interactive learning experience to chart a path toward personal, firm, and industry transformation.

2:00 – 3:15 pm

What You Need to Know as CEO about IT in Your Firm – A Brave New World

Cort Kane, Design Data Systems, Inc.

Many firm executives know very little about technology, yet technology forms the toolset for most corporate strategic objectives so it is essential to know what technology looks like now and what is on the horizon specific to engineering firms. Come hear a discussion on where technology is, what the trends are, and what some ACEC member firms are currently doing.

Design Quality – Process Driven Risk Management

Gary Prather, Travelers Insurance; David Ericksen, Severson & Werson, PC

Quality management, project management and risk management all work in tandem to make a firm successful, so integrating a more effective quality program strengthens the other two legs of the three-legged stool. This session provides a step by step approach to implementing effective quality initiatives into any firm's business model.

Use Contract Documents for America's Infrastructure & Beware of Risks Posed by Non-Standard Documents

Gerard P. Cavaluzzi, Esq.; James C. Brown, II, PE; Kevin M. O'Beirne, PE, Malcolm Pirnie, Inc.

Certain engineering firms – and clients – rely on construction contract documents that are not based on industry standards, increasing exposure to significant risks. This session will examine those risks, why you should be concerned about using non-standard documents, how to best utilize industry-standard contracts and provisions, how to identify provisions that commonly pose liability issues, and how to develop a program to limit those risks.



Issues Facing MEPs Today - Roundtable Discussion on Challenges and Opportunities in Today's Market

James Escamilla, Byce & Associates, Inc.; Robin S. Greenleaf, PE, LEED AP, Architectural Engineers, Inc.

The CAMEE leadership will lead a discussion on major topics facing the profession today.

3:45 – 5:00 pm

Insights into Delivering Exceptional Solutions to Public Infrastructure Clients

Giles Jacknain, The Oikos Collective

The success of our communities depends on the development of sustainable and supportive systems of public infrastructure, so engineering companies must understand how to tailor their capabilities to work with public infrastructure clients. Participants in this session will use case studies to build strategies that enable their firms to take advantage of trends affecting public infrastructure clients and the very nature of the clients themselves.

Digital Assets: Real-time Environments for Real-time Projects

Paul Doherty, the digit group, inc.

Integrated, interactive and realtime environments are becoming the "digital assets" for providing services across the entire lifecycle of infrastructure. This session will use real world examples to provide attendees with the lessons learned and best practices of integrating life cycle technologies for infrastructure projects from a practical, applicable approach to technology.

How Soon? How Fast? High-Speed Rail in California and America

Kenneth Jong, PE, Parsons Brinckerhoff

President Obama has said that a better rail system in the US will be key to solving America's energy dependency, and various states are considering high-speed rail as a viable option. California has been among the leaders in this arena and is currently developing a state-of-the-art new rail system that will link all major cities in the state. This session will explore California's proposed solutions based on technologies from around the world.

SATURDAY, October 10, 2009

8:45 – 10:00 am

Customer Service? Who Cares? Why It *Really* Matters Now

Mark Goodale, Morrissey Goodale

Doesn't anyone care about Customer Service anymore? Your clients sure do: A recent study shows that today's clients are not afraid to change engineering firms if customer service falls short of expectations, so your firm's margin for error has never been slimmer. The good news is that effective customer service techniques can be implemented quickly and at little cost and this entertaining session will show you how.

Optimization Software Can Make You the Company HERO!

David Settlemyer, PE, PLS, Blueridge Analytics

Civil engineering firms currently using Optimization Software are giving their clients better designs faster, so if you're not, you are behind the curve as optimization software is the future of both vertical structures and land development design. Come learn the details of how this new technology-based approach to design works to maximize project efficiency, client options, and value.



Small Firm Ownership Transition: Part I Financial Aspects

Colvin Matheson, Matheson Financial Advisors, Inc.

Understanding the financial principles that drive ownership transitions is essential to accurately valuing your firm and successfully undertaking a smooth transition. This session will discuss key valuation approaches and how to structure an ownership transition, and will stress how increasing firm profits and sound financial accounting to perpetuate growth for the next generations of owners are key to successful transitions.

10:15 – 11:30 am

Managing Your Retirement Plan Fiduciary Responsibilities during These Unprecedented Times.

Erin Turley, Morgan Lewis & Bockius, LLP

This session will explain who ERISA fiduciaries are; who is likely to get sued and how to protect against potential fiduciary liability; and what protections are afforded by ERISA section 404, plan investments, diversification and participant communication. It will examine the current state of litigation against plan sponsors with respect to expenses paid by the plan, selecting service providers, and recent DOL fee initiatives, and will look at how the ACEC Retirement Trust assists ACEC members with their fiduciary responsibilities.



Ownership Transition Part II: Cultural Aspects of Ownership Transition

Panel Discussion

Colvin Matheson, Matheson Financial Advisors, Inc.; Rod Hoffman, PE, S&H Consulting; John D. Forcier, PE, Forcier Aldrich & Associates, Inc.

Confused about ownership transition? This session will feature a panel of small firm owners who have been on both sides of a transition and can speak from experience about the internal politics of a firm that must be considered in order to ensure the firm continues to thrive under its new leadership.

Thank you for your interest in the ACEC 2009 Fall Conference!