

Benchmarking 2020

Assessing New York Metro-Area Firms



WHEN: **March 25, 2020**
7:30 AM – 12:30 PM (*see full agenda on reverse*)

WHERE: **Office of Wells Fargo, New York, NY**
150 East 42nd Street, New York, NY 10017

DESCRIPTION: The purpose of this report and program is to compile, analyze, and summarize the most relevant operating and financial metrics, and associated Key Performance Indicators (KPIs) for NYC Metro-area engineering/consulting firms in order to provide actionable insights that firm leaders can use to improve financial circumstances, manage risk, and to more effectively address their most pressing leadership and management challenges.

REGISTER*: **Members: \$799 per attendee | Non-members: \$999 per attendee**
(limited to 50 attendees, 2 attendees per firm; registration is first come, first served. Includes a copy of the report.)

SPONSOR*: **Gold: \$2,500** for Members | **\$5,000** for Non-members (*includes registration for two (2) attendees, signage and recognition*)

Silver: \$1,500 for Members | **\$3,000** Non-members (*includes registration for one (1) attendee, signage and recognition*)

REPORT ONLY*: **Free for event participants | \$399 for Members | \$599 for Non-Members**

**Survey Participants (by firm): Receive \$200 off ticket price (per ticket) or \$100 off report only.*

AGENDA: (note: agenda is preliminary and subject to change)

7:30 – 8:00 AM | Registration and Continental Breakfast

8:00 – 9:00 AM | Survey Results/Interpretation

<i>Introduction/Welcome</i>	Jay Simson , President & CEO ACEC New York
<i>Survey Results/Interpretation</i>	Phillip Ross , CPA, CGMA, Partner Anchin, Block & Anchin
	Brian Kenet , MBA, Senior Business Advisor Anchin, Block & Anchin
<i>Comparison of NYC Metro Data with National Data</i>	Rebecca Zofnass , Managing Partner EFCG

9:00 – 10:00 AM | Marketplace/Strategic Issues

<i>Moderator:</i>	Linda Darr , President & CEO ACEC National
<i>Panelists:</i>	Kei Sasaki , CFA, Managing Director Wells Fargo
	Representative TBD NYCEDC
	Mitchel Simpler , PE, Partner Jaros, Baum & Bolles

10:00 – 10:15 AM | BREAK

10:15 – 11:15 AM | Firm Finances & Risk Management

<i>Moderator:</i>	Phillip Ross , CPA, CGMA, Partner Anchin, Block & Anchin
<i>Panelists:</i>	Michelle Golembieski , Executive Director J.P. Morgan
	Kent Collier , J.D., CRIS, LEED AP BD + C, Client Executive/Professional Services Risk Consultant Greyling Insurance Brokerage
	Chuck Kohler , Chief Operating Officer STV Group

11:15 AM – 12:15 PM | Ownership/Leadership Transition & M&A

<i>Moderator:</i>	Brian Kenet , MBA, Senior Business Advisor Anchin, Block & Anchin
<i>Panelists:</i>	Steven Gido , CFA, Principal ROG + Partners, LLC
	Patrick Sheridan , CFO WSP USA
	Sheila Di Gasper , Partner Ingram, Yuzek Gainen Carroll+Bertolotti

12:15 – 12:30 PM | Closing Remarks

Firm Name	
Phone Number	
Name of Attendee 1	
Email of Attendee 1	
Name of Attendee 2	
Email of Attendee 2	
<input type="checkbox"/> I am not sending attendees to the program but want a copy of the report (see reverse for pricing).	
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Checks should be made payable to ACEC New York: 6 Airline Drive, Albany, NY 12205. Questions? Contact Jennifer Waterbuy at jennifer@acecnyc.org or call (518) 452-8611. All registrations due March 20, 2020.