ACEC

American Council of Engineering Companies
of North Dakota

Professional Development Series

2020 - 2021

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ABOUT THE PROGRAM

Professional Development Series:
ACEC/ND and the larger consulting industry have prospered over the years as a result of strong leadership among professional engineers. To ensure that we enjoy an equally successful future, we must invest in our engineering firm's leaders.

The Professional Development Series has been developed as a high impact program that fosters leaders by imparting skills and competencies identified by top ACEC/ND CEOs as critical for leadership success. Our curriculum and nationally recognized faculty have been carefully crafted and chosen to meet the needs of North Dakota's engineering firms.

Format:
This is a 2-year course consisting of 4 sessions per year (February, May, August and November) all sessions will be held at the Radisson Hotel in Bismarck. The May and November sessions will immediately precede our annual Spring and Fall Conferences. Although the sessions don't have any formal networking events included, we may have some spontaneous pre or post session opportunities to get to know participants better. Each session will be one-day in length and will include the cost of the Fall and Spring ACEC/ND Conferences. If a participant completes all 8 sessions, they will have completed the entire program and will be considered a "graduate" of the program. If you miss one of the sessions you can make it up the next time it's offered. Graduates of the program will be acknowledged at the Spring Conference of the year in which you completed the program.

Curriculum & Faculty:
Faculty members are national experts in each of the course areas. Course design has incorporated both the 'hard' and 'soft' skills necessary for long-term leadership success in the AE industry. Topics will include:

- Personal Leadership: Part 1 - *May 11, 2020 (In conjunction with the Spring Conference)*
- Strategy and Market Trends - *August 19, 2020*
- Leading Others and Leading Change - *November 10, 2020 (In conjunction with the Fall Conference)*
- Building Business Development Relationships to Last - *February 24, 2021*
- Professional Ethics/Risk Management/Contracts - *May 10, 2021 (In conjunction with the Spring Conference)*
- Human Resources - *August 18, 2021*
- Financial Management of the Business - *November 9, 2021 (In conjunction with the Fall Conference)*
- Personal Leadership: Part 2 - *February 16, 2022*

The full list of courses and presenters are listed on the following pages of this packet. We encourage you to take a look at the information and please reach out to the Executive Director team if you have any questions about the program.

Application Procedure and Course Tuition:
To ensure high quality learning and networking experience the 2020 Program's enrollment is limited to 20 participants—one participant per firm (see note below.) The class is likely to fill quickly, so mail as soon as possible the application for one of your firm's applicants. The application is on the last page of this document and must be mailed along with your check for the program's tuition. the check will be returned if the applicant is not accepted. The tuition for the full 8 session program is $5,000 (member rate) per participant and includes breakfasts and lunch of each session as well as the Fall and Spring Conference fees. We ask that you mail half of the tuition ($2,500) with your application and the other half will be billed in the second year of the program.

Note: A second applicant from your firm may be placed on the alternate list and will be considered if the class is not filled. The alternate's application must be clearly marked "Alternate" and a separate check must be enclosed which will be returned if the applicant is not accepted.

CIRRICULUM

Personal Leadership: What am I doing here?
with Jon Hauser

You are created and hard-wired for greatness. You are not average. You were placed on this planet at this specific place and time to make a positive difference; a positive impact on this world. So, let's make every day count! Let's maximize our life and leave a lasting legacy. During our time together I would love to intrigue, inspire and help you increase your positive life impact! The formula we will begin with is Life Impact = Competence X Character X Leadership Level. You will learn relatable principles and practical tools on personal leadership and connecting with others you can immediately put into practice.

Strategy and Market Trends
with Vernae Jones-Seals

How does the market define your firm's success? How well aligned are your business strategies with current market trends? What do you need to grow your business? Don't forget the back office, Marketing, Accounting/Finance, IT, HR, etc. are all part of the equation for success. During the program we will have discussion, interactive exercises to assist you in the following:

- Evaluating Industry Trends as a Strategic Thinker
- Leveraging Market Trends in developing Strategic Goals
- Developing a framework for your firm's sustainability plan

We will explore a few industry trends to better understand how they influence your business decisions. Join us to learn more about being strategic and effective at every stage of your business lifecycle, applying design and system thinking.

Leading Others and Leading Change
with Dan Oblinger

How might we learn to listen and negotiate in order to lead our culture and resolve conflict? This one day workshop focuses on active listening strategies as practiced by hostage negotiators. It is a guided tour of powerful communications techniques that can be used for business development, managing employee performance, resolving conflict, and leading cultures through transitions and challenges. Participants will:

- Discover the relationship of listening, empathy, trust, and influence in the context of leading a modern consulting engineering firm.
- Re-engineer the concepts of conflict and change to see them as opportunities using listening strategies.
- Identify their own bad listening habits.
- Encounter the 8 active listening techniques used in crisis negotiations.
- Apply them to their daily leadership opportunities through dynamic role-play scenarios.
- Each of the lessons is told through actual hostage and crisis negotiation stories and then brought to life with interactive exercises. Come ready to play!

CIRRICULUM

Building Business Development Relationships to Last
with Shawn Buxton

In a competitive marketplace the average business development person finds themselves lost in a sea of bids and proposals. After months of work inevitably customers make their decision based on the lowest price rather than the best solution. In this session 20 year Sales Pro Shawn Buxton will share some of the strategies and secrets shared by top performers in every industry. Make a connection, demonstrate your value, and create a client for life. Participants will learn things like:

- How to build rapport with authenticity
- Asking the right questions that position you as an expert
- Presenting solutions with confidence
- Handling objections with grace
- Closing the deal without fear
- Selling value instead of price
- And more...

Join us for an interactive day session full of real world scenarios and application you can take back to your firm and implement tomorrow.

Professional Ethics/Risk Management/Contracts
with Andrew Mendelson

Design firms face risk every day. At times, engineering can feel like a minefield. The purpose of this workshop is to help guide you through without getting blown up by risk. Risk management for design professionals is practice management. A proactive Risk Management Plan is an essential element of loss prevention and a key ingredient of financial success for a design firm. When a Risk Management plan is integrated into a firm's culture and embraced by its leadership, it makes a significant positive impact on business performance and longevity. You'll gain strategies and tools to help you develop an effective plan that contemplates the entire project cycle: from client selection to project inception and through project closeout. In this course participants will, recognize the importance of having a Risk Management Plan, be able to distinguish between two broad types of risk for design professionals and identify the four parts of the risk management model, understand the purpose and composition of a Risk Management Team, learn the seven components of an effective Risk Management Plan. (Including, project/client selection, team capabilities, contract review and negotiation, contract education for the design team, communication and documentation, project and quality management and staff training and development.

In addition, your professional services agreement is an essential toll in managing your exposure to risk. An equitable contract fairly apportions risk, while an onerous contract can shift inordinate—and sometimes uninsurable—liability to you. The terms and conditions of the agreement establish the roles and responsibilities of the design professional and the client. The contract review and negotiation process provide you with an opportunity to set reasonable expectations with your client. And, in the event of a claim or dispute, your contract is the first piece of documentation the claims examiner will request. This workshop reviews the risk management fundamentals that underlie the development of effective contracts, the contract review process, and key clauses that impact your risk exposure.

CIRRICULUM

Cradle to Grave HR Strategy
with Laurie Dreyer

The need to find, grow and keep talent has never been greater, and with 4 generations in the work place during rapid industry change, it has never been more complex. Come participate and engage in some current HR thinking! We will cover every aspect of HR in a firm, and discuss options for keeping HR skills in the firm versus options to outsource. We will discuss how our firms are viewed in a world of social media, and how we recruit – because they are intertwined. We will discuss benefits, payroll, compensation, policies and compliance knowledge needed to keep the business running. In order to attract, grow and keep the talent we have - we will also cover learning very broadly as an over-arching strategy: including onboarding, professional development, performance management and coaching/mentoring. We will shift into conflicts, feedback that works and. if necessary, how to manage effective terminations. This session will be highly interactive and contain exercises.

Financial management of the business
with David Cohen

Through exercises, we will analyze and work towards understanding financial statements and the resulting key financial ratios and the impact they have on building shareholder value. This carries through to thinking like a businessperson and making decisions that correspond to running your engineering firm like a business. It is imperative to understand the connection between project management and performance to shareholder value as this is the overriding concept to running a business.

We will develop a macro-level understanding of business finance as it relates to the project-centered engineering firm. This will include developing a basic level of accounting knowledge, relating this to project performance, and beginning to connect it all with driving value and understanding the investment nature of your engineering firms. We will continue connecting the dots between what happens at the firm everyday and shareholder value. As we create a firmer grasp of the connection, we will discuss basic valuation concepts and how these relate to the various exit strategies, including internal ownership transition planning and mergers and acquisitions. General Topics will include:

- Accounting 101
- Financial Statements
- Financial Analysis and Key Financial Ratios
- Building Shareholder Value
- Valuation and Valuation Formulas
- Internal Ownership Transition Planning
- Mergers and Acquisitions

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SPEAKERS

Jon Hauser grew up in Williston, ND; graduating in 1989 from North Dakota State University with a degree in Electrical Engineering and 1994 from Nazarene Theological Seminary with a Master's in religious education. He worked as a high voltage substation engineer for 20 years for Burns and McDonnell and Ulteig Engineers, serving as department manager for a season. In 2000, he dove into an entrepreneurial project, as he and his wife, Teri, started a new church called Prairie Heights in Fargo, ND. Jon served as co-founder and senior pastor as Prairie Heights grew from a few friends to a dynamic church of over 4,500 people and 20 full-time staff members.

He writes a weekly newspaper column on faith, family, and leadership that is published in the Fargo Forum, Minot Daily News, Dickinson Press, Jamestown Sun and Grand Forks Herald. In 2011 Jon completed training as a founding member of the John Maxwell Team. He has provided leadership training and speaking for sales and team leader meetings, technical conferences, and corporate management retreats along with coaching executive leaders. His passion is to help people maximize their life impact using the formula "Character" times "Competence" times "Leadership Level" equals your "Life Impact". Jon and Teri have been married 30 years and have 2 children.

Vernae Jones-Seals, a strategic advisor with over 20 years of combined business, financial and technical management experience assisting Boards of Directors, CEOs, Senior Executives, and Entrepreneurs with developing succession, strategic and tactical plans. In 2002, Vernae launched One Source Consulting, LLC (OneSource) to provide consulting services and solutions to the AEC industry. For She has collaborated with privately held companies in developing strategic plans for sustainable growth. She and her team are committed to:

- Managing Accounting, Finance, IT and HR teams with thought leadership and innovative strategies.
- Leading Digital Transformation, primarily (ERP) Systems Consulting, and Robotic Process Automation to improve collaboration and efficiency.

Vernae is a University of Maryland Robert H. Smith School of Business, with an MBA and a degree in Finance & Accounting. She is a certified Change Management Professional and an Economic Development Finance Professional. As a member of the BDO Alliance, She serves on the Advisory Council and as a Board of Directors for the Construction Accounting Network.

Vernae is driven by empowering others with access to sound and reliable business resources. She has demonstrated her passion and commitment to the design and business community as a guest lecture for University of Virginia, School of Architecture, Design Entrepreneurship course; and through her alliances with several law firms, CPA firms, universities other organizations with a commitment to the AEC community.

SPEAKERS

Shawn Buxton is a professional speaker, consultant, and performance coach who has worked with teams all over the US and internationally including Canada, the United Kingdom, Central America, Austrialia, Ireland, and India. For over 20 years, Shawn has devoted his career to coaching and teaching leaders for multiple Fortune 100 companies like Staples, J.P. Morgan, and HCA Healthcare.

Shawn currently lives in Kansas City with his wife and three boys where he oversees the sales leadership development program for a one billion dollar tech company.

As a former manager and university professor, Shawn knows first hand the value of a practical approach that works. From senior leadership, to the front lines—he consistently demonstrates the ability to connect and establish credibility with a broad variety of audiences.

Shawn's real world, execution oriented approach focuses on getting results and building skills that participants can take back, immediately apply in their organizations, and increase performance.

Andrew D. Mendelson, FAIA, is Senior Vice President and Chief Risk Management Officer of Berkley Design Professional, a Berkley company. Andy joined Berkley DP in July 2013 after a 36+ year career as a licensed architect and firm principal with a diverse background of practice, project, financial, operations and risk management experience particularly in the large A/E firm environment. He has held corporate leadership positions as CFO, Contracting Officer and Director of the Education market sector at OWP/P (Chicago) and prior to joining Berkley DP served as Director of Practice Management for CannonDesign.

Andy is an acknowledged design industry leader in the area of risk management and contracting. He has advanced the development and publishing of industry standard contracts through leadership of and engagement with AIA Documents Committee (active member 2003 - 2017) and the Large Firm Round Table (LFRT) Legal Committee (2000 – 2010). He is also a member of the ACEC Risk Management Committee.

Andy directs Berkley DP's value-added service initiatives to design professionals in providing leading-edge risk and practice management resources, tools and training with a focus on key contracting, business, project management and project delivery issues affecting architects, engineers and other design consultants.

Andy attained a B.S. degree in Architectural Studies from the University of Illinois (highest honors) and a business management certification from the Kellogg School of Management of Northwestern University. He was recognized as a Fellow of the American Institute of Architects in 2011 for his leadership in professional services contracting.

SPEAKERS

Laurie Dreyer is a graduate of UC Berkeley, Laurie has a background in key HR leadership for The Ratcliff Architects, Gensler, Psomas, Anshen+Allen/Stantec, and now Taylor Design! A frequent speaker and teacher Laurie has presented for the AIA, ACEC's Senior Executives Institute, Knowledge Architecture, AE advisors CEO Roundtables, Matheson Financial conferences and other events. Laurie was raised in the AEC industry and has spent most of her career in it. She also maintains connections to The Future of Engineering and other industry organizations. The future is changing fast.

David Cohen specializes in business valuations, ownership transition and succession planning, and mergers and acquisitions as part of exit strategies and strategic plans. David has completed appraisal assignments for purposes of mergers and acquisitions, internal ownership transition and succession planning, Employee Stock Ownership Plans (ESOPs), and various litigation support engagements. David has assisted clients with all facets of ownership transition planning including analyzing the financial makeup of the company, designing stock valuation formulae, testing the financial feasibility of various stock transition options, and making recommendations for the shareholder's agreement. He has also assisted clients through the mergers and acquisitions process—helping them identify potential buyers or sellers, conducting due diligence, negotiating, structuring and closing the deal, and integrating the firms.

As an expert in financial advisory services, David conducts seminars on the topics of financial management, valuation, ownership transition planning, and mergers and acquisitions for the design industry, as well as leading in-house educational presentations for firms nationwide and speaking at ACEC and AIA National and State conferences and seminars. In addition, he is an instructor for the ACEC Business of Design Consulting program as well as for multiple ACEC State Emerging Leaders' Programs.

By night, **Dan Oblinger** is a police officer and hostage negotiator. By day, he is the sole proprietor of Leadercraft, a private company devoted to excellence in keynote speaking and corporate training. Dan is a father, husband, philosopher, and lawman. He has been successful in his professional life as a public speaker, author, hostage negotiator, undercover human trafficking investigator, human resources consultant, chicken rancher, drug recognition expert, ditch digger, grocery bagger, onion ring maker, landlord, and beat cop. Oblinger has used his exotic blend of experiences and high energy humor to serve audiences since 2008.

He is the author of two books: "The 28 Laws of Listening" and "Life or Death Listening: A Hostage Negotiator's How-to Guide to Mastering the Essential Communication Skill." He is a 2018 graduate of the FBI National Crisis Negotiator Course in Quantico, VA. Dan's passion is sharing his listening, negotiating, and leadership skills so everyone can become more authentic leaders and lovers. He is a trainer in emerging leader programs for ACEC chapters in Kansas, Missouri, Nebraska, Michigan, Ohio, and North Dakota. Oblinger lives in the heart of the Kansas prairie with his wife and five children.

APPLICATION

Instructions: Mail (by USPS only) the completed form along with a $2,500 check payable to ACEC/ND by March 15th to: ACEC/ND, Attn: Stacy Krumwiede, PO Box 7370, Bismarck, ND 58507. Applications sent using a carrier requiring a physical address will be returned as undeliverable. Credit cards and/or electronic transmittal will not be accepted.

Applicants will be notified by March 31st if they have been accepted into the Professional Development Series.

Applicant Name: ____

Title: ____ ND Reg. # ___________

Firm: ____

North Dakota Address: ____

Telephone: ___________________________________ Email: ____

Investment and 2020-2021 Tuition:

The 2020-2021 investment for this extensive training is $5,000 per ACEC/ND member and $6,250 per non-member tuition. It includes registration for all 2020-2021 sessions of the Series and all meals/breaks at each session. In addition, the tuition includes the spring and fall conferences. Tuition year 1 and 2 will be invoiced and payable May 1st of each year. Additional costs associated with the sessions (i.e.: overnight stays and optional activities not covered by tuition) are the responsibility of the individual/firm.

Circle One: ACEC/ND Member Rate: $5000 Non - Member Rate: $6,250

Once you have signed up and paid for the Professional Development Series, there will not be any refunds. However, you can make up the course (s) you miss in a subsequent year.

☐ I agree to the aforementioned refund policy.

Signature: ____Date: ______________________

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