

## *99<sup>th</sup> Annual AGC Convention Education Sessions*

**Monday, February 26<sup>th</sup> 11:00 am – 12:00 pm**

**Title:**

1. Be Kind, Be Truthful, Be Brave: Secrets to a Century-Plus Owner Constructor Partnership

**Category:**

Finance

**Description:**

There aren't many owner-constructor relationships that last more than a century, but Michigan State University and the Christman Company have been working together since 1908. During that time, Christman has constructed dozens of buildings on MSU's campus, and renovated many more. The key to maintaining this relationship is healthy and respectful communication, and choosing to deal with problems rather than writing each other off. In this session, representatives of Christman and MSU will discuss some of the watershed moments, and how the partners have built on past success and learned from failures.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Recognize the importance of working beyond individual projects and transactions, instead focusing on a value-add relationship.
- Discuss the advantages of jointly addressing risks and potential problems.
- Examine how owners value feedback from constructors, and hear suggestions on how to frame it to make it resonate.
- Identify ways critical prerequisites of long-term relationships- such as trust, mutual respect, and tolerance- can be achieved and maintained when the institutional relationships outlast the specific individuals involved.

**Speaker(s):**

John Mumma – Michigan State University

Jay Smith – The Christman Company

**CEUs:**

0.1 IACET CEUs

1.0 AIA Learning Unit

1.2 CPE Credit in Business Management & Organization

1.0 AIC CPD Unit

1.0 SMPS CEU

**Title:**

2. Harassment session – Title TBD

**Category:**

Insurance & Risk

**Speaker(s):**

D. Albert Brannen – Fisher & Phillips LLP

**Title:**

3. Partnering State of the Art: How is Partnering Being Used Today by DOTs on Traditional and Alternative Procurements?

**Category:**

Highway & Utility Infrastructure

**Description:**

Construction partnering was all the rage in the 1990-2000s when state Departments of Transportation realized that resolving construction issues and concerns at the lowest level reduced disputes and litigation thereby saving time and reducing costs. Some say that partnering is a relic of the past and most DOTs no longer are engaged. An Iowa State University study says otherwise – Partnering is alive and well and is now even being used on design-build and CMGC projects.

This session will provide a report on the state of the art in partnering across the country and present you with ideas for engaging your own state DOT to reenergize their partnering efforts.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Discuss the history of construction partnering.
- Recognize how resolving construction issues and concerns at the lowest level reduces disputes and litigation thereby saving time and reducing costs.
- Describe how partnering is being used on design-build and CMGC projects.
- Identify best practices for engaging your state DOT to reenergize their partnering efforts.

**Speaker(s):**

Doug Gransberg – Iowa State University

**CEUs:**

0.1 IACET CEUs

1.0 AIA Learning Unit

1.2 CPE Credit in Business Management & Organization

1.0 AIC CPD Unit

1.0 SMPS CEU

**Monday, February 26<sup>th</sup> 1:30 pm – 2:30 pm**

**Title:**

4. Getting Employees to the Next Level: The Apprenticeship Model

**Category:**

Workforce

**Description:**

The secret to building leadership capacity? Apprenticeship.

When it comes to leadership, high-performers often become victims of their own success when they are put into positions of leadership ill-prepared to handle the rigors and challenges of managing or developing others. The solution is right in front of us. In fact, no other industry understands effective employee development better than construction. The trades practice it, every day. Apprenticeship is the intentional transfer of skills, knowledge and expertise. What if we take a cue from the craft side of construction to build an intentional leadership program within construction organizations to produce secure, confident and humble leaders? It could potentially change the next generation of construction leaders.

In an August 2017 Harvard Business Review article, the author wrote how Google's two-year study on team performance revealed that the highest-performing teams have one thing in common; psychological safety, which is the belief that you won't be punished when you make a mistake. The article went on to say that "psychological safety allows for moderate risk-taking, speaking your mind, creativity, and sticking your neck out without fear of having it cut off." This kind of environment is present when someone is intentionally taken through an apprenticeship program. Apprentices are given an opportunity to learn and make mistakes under the guidance of another.

This workshop will explore the basic principles of an apprenticeship model of leadership development. There will be practical examples from an AGC member in New Mexico that has used this approach in their employee development. Concepts will be illustrated through visual tools that, while representing profound leadership concepts, are simple, memorable and transferable. Participants will walk away with a framework to begin looking at their employee development through a different lens.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Define the Apprenticeship Model of people development which involves four distinct phases.
- Recognize the potential pitfalls of skipping phases and what to do if/when it happens.
- Identify the behaviors and mindset that will undermine the success of a leadership development program.
- Build confidence in using the Apprenticeship Model to influence and modify current employee development approaches.

**Speaker(s):**

Maria Guy – GiANT Worldwide

Sam Hatchell – Jaynes Corporation

**CEUs:**

0.1 IACET CEUs  
1.0 AIA Learning Unit  
1.2 CPE Credit in Personnel/Human Resources  
1.0 AIC CPD Unit  
1.0 SMPS CEU

**Title:**

5. Session TBD

**Category:**

Jobsite Productivity

**Title:**

6. Tax Reform: Impact on the Construction Industry

**Category:**

Finance

**Description:**

This session will be a panel discussion on Congress's tax reform efforts, and the impact of tax reform proposals on the construction industry. The panelists will include Matt Turkstra, AGC, and a CPA/Tax Professional. Matt will provide an update on AGC's tax reform priorities and activities, and will discuss the implications of tax reform proposals on the construction industry. Depending on how far along Congress is in the tax reform process, panelists will be able to discuss how tax reform will affect strategic decisions and business practices for the broader industry but also for individual companies. They will also provide an update on changes in accounting standards for revenue recognition and leases and how they will affect the industry.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Discuss AGC's tax reform priorities and activities.
- Identify the implications of tax reform on the construction industry.
- Describe how tax reform will affect strategic decisions and business practices for individual companies, as well as the broader industry.
- Discuss changes in accounting standards for revenue recognition and leases, and how they will affect the industry.

**Speaker(s):**

Matthew Turkstra – AGC of America  
Perry McGowan – CliftonLarsonAllen LLP

**CEUs:**

0.1 IACET CEUs  
1.0 AIA Learning Unit  
1.2 CPE Credit in Taxes  
1.0 AIC CPD Unit  
1.0 SMPS CEU

**Monday, February 26<sup>th</sup> 3:00 pm – 4:00 pm**

**Title:**

7. The Road to Success: Reducing Vehicle Crashes

**Category:**

Insurance & Risk

**Description:**

Following several years of decreases in fatal crash rates, fatalities versus miles driven are on the increase. Statistics for 2015 and 2016 indicate estimated increases of 4.6% and 2%, respectively. Those statistics, combined with an increase in overall vehicle crash rates, are driving additional focus on fleet safety issues.

This session will emphasize factors impacting vehicle crash increases, discuss approaches to help manage driver distraction, and highlight technological tools to improve driver behaviors and results. Attendees will learn strategies for implementing an effective vehicle telematics program and for turning data into actionable insights to improve driver performance.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Identify trends in auto crashes and key factors driving these trends.
- Define the capabilities of some common vehicle telematics tools and which attributes are likely to drive the best on-road safety improvements.
- Implement vehicle telematics, and explore the challenges and successes faced by a contractor who has recently implemented a vehicle telematics program.
- Examine future technologies, such as autonomous vehicles, and discuss the potential impact it could have on the construction industry.

**Speaker(s):**

Eric Lambert – Zurich North America

Steven McGill – Volkert, Inc.

**CEUs:**

0.1 IACET CEUs

1.0 AIA Learning Unit

1.2 CPE Credit in Management Services

1.0 AIC CPD Unit

1.0 SMPS CEU

**Title:**

8. Rethinking Attracting and Retaining Best-in-Class Talent: A Battle You Can't Afford to Lose

**Category:**

Workforce

**Description:**

Every firm is experiencing a true war on talent- keeping your best people while competitors eagerly pursue them, and finding skilled workers, educated professionals and future leaders in one of the greatest shortages our industry has experienced. This effects the client experience, the culture and the healthy growth of our firms.

Ironically, many construction companies don't think of recruiting as a corporate strategic plan and marketing challenge. Instead, they think of it as an HR issue. However, acquiring and retaining talent is really no different than acquiring and retaining clients- develop a strategy, filter through an unwavering culture, and execute with a strong marketing approach. Most companies would not consider approaching a client acquisition strategy without a clear value proposition, segmentation, profitable fee structure, collateral, sales approach and brand; yet, when it comes to talent acquisition, we tend to abandon strategy and focus on the immediate need and/or technical resumes.

In this session, we will apply the strategy, culture indicators, and a comprehensive recruiting marketing strategy to assist the audience in crafting their own Employee Retention and Recruitment Goals and actions that will ensure improved engagement and prospective employee awareness and interest in your firm.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Define cultural archetypes and identify the true culture your firm possesses as the cornerstone of stability to employ internally and externally for current and future employees.
- Identify and utilize best-in-class Employee Retention Best Practices.
- Identify marketing activities and media that are most effective for employee attraction, including social media, video, career fair success, partnerships and SEO/paid job posting as a customized approach.
- Leverage internal and external feedback to measure company retention and attraction goals.

**Speaker(s):**

Danielle B. Feroletto – Small Giants

James Paul Murphy – Willmeng Construction

**CEUs:**

0.1 IACET CEUs

1.0 AIA Learning Unit

1.2 CPE Credit in Personnel/Human Resources

1.0 AIC CPD Unit

1.0 SMPS CEU

**Title:**

9. Fighting Chaos and Ignorance: The Only Real Enemies!

**Category:**

Jobsite Productivity

**Description:**

Construction can be an argumentative, claim-laced, legal quagmire, and this is not out of necessity, but more from choice. So, how can we change for the better and make construction enjoyable, and more profitable? We will pursue happiness through the collaboration and accountability generated from a BIM process. This session will walk through what leaders need to do to start and execute change for their companies and for the Trades Contractors, Architects, Engineers, and Owners they work with. How do we use BIM to establish a collaborative environment? How do we use BIM to increase accountability and reduce risk? How does BIM increase contractor and trade profitability? BIM can't solve all your problems, but it is a good place to start.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Describe how to use BIM to establish a collaborative environment.
- Identify how to use BIM to increase accountability and reduce risk.
- Examine how to use BIM to increase contractor and trade profitability.
- Discuss how to use BIM to avoid common legal problems of the past.

**Speaker(s):**

Benjamin Crosby – Yates Construction

**CEUs:**

0.1 IACET CEUs

1.0 AIA Learning Unit

1.2 CPE Credit in Computer Software & Applications

1.0 AIC CPD Unit

1.0 SMPS CEU

1.0 CM-BIM CE Hour

1.0 CM-Lean CE Hour

**Tuesday, February 27<sup>th</sup> 9:00 am – 10:00 am**

**Title:**

10. Aligning the IT Portfolio: Three Evolutionary Steps

**Category:**

Technology

**Description:**

The challenge that IT organizations have faced since their inception is making sure that the services they are delivering are moving in the same direction as the business. Framework and best practices like ITIL (IT Infrastructure Library) explicitly try to deliver on this promise.

In the construction industry, the growth of technology solutions demands that IT leaders be intentional about choosing the projects they take on. There are so many competing voices all demanding our attention – from inside the organization (from the field, administrative support teams, and executives) to outside the organization (software and hardware vendors). IT doesn't suffer from a lack of

opportunities to implement new tools, systems, and processes; but they will surely fail if they don't support the business.

In this session, we will discuss three evolutionary steps to enhance alignment of IT projects: identify one key area of focus for the entire business and evaluate current projects; define second-order areas of focus for different parts of the business (design, field management, administration, project management) and prioritize projects that drive results in each; and communicate that focus to the team and help them keep the business outcomes front-of-mind.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Identify how to link IT projects with construction/business outcomes.
- Create second-order "areas of focus" in different phases of construction and parts of the business.
- Discuss how to prioritize IT projects for each "area of focus".
- Communicate this alignment to their teams and reinforce it.

**Speaker(s):**

Adam Krob – Boh Bros Construction

**CEUs:**

0.1 IACET CEUs

1.0 AIA Learning Unit

1.2 CPE Credit in Information Technology

1.0 AIC CPD Unit

1.0 SMPS CEU

**Title:**

11. Best Practices for Building Diversity & Inclusion in Your Company

**Category:**

Workforce

**Description:**

We already know that companies with effective diversity and inclusion strategies are more competitive, sustainable and profitable. But, how do you build an effective diversity and inclusion program? Where do you begin? How do you know what works and what doesn't?

This session will feature a panel of construction industry leaders who will share best practices and effective tactics their companies have used to leverage diversity and inclusion on jobsites. You also will learn how these companies integrate diversity and inclusion in all aspects of their business operations, including workforce, partnerships and joint ventures, and supply chain.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Recognize how companies with effective diversity and inclusion strategies are more competitive, sustainable and profitable.

- Identify best practices for starting a diversity and inclusion program.
- Determine how to leverage diversity and inclusion on jobsites.
- Integrate diversity and inclusion into all aspects of business operations, including workforce, partnerships and joint ventures, and supply chain.

**Speaker(s):**

William Noonan – Willis Towers Watson

Krista Twesme – Mortenson

Miguel Galarza – Yerba Buena Engineering & Construction, Inc.

**CEUs:**

0.1 IACET CEUs

1.0 AIA Learning Unit

1.2 CPE Credit in Personnel/Human Resources

1.0 AIC CPD Unit

1.0 SMPS CEU

**Title:**

12. Future Road Builders: Play the Game and Get to Work

**Category:**

Highway & Utility Infrastructure

**Description:**

Future Road Builders 2.0 (FRB 2.0) is an effective and interactive virtual pre-apprenticeship tool that uses technology to engage its users to learn about construction jobs, complete in-context challenges, play microgames, and watch short project videos coupled with virtual exploration of a jobsite. This session will be interactive, allowing the audience to participate and also contemplate how FRB 2.0 is an innovative workforce development tool relevant to their organizations, as well as the construction industry at large. Background information on the initial development of the Future Road Builders virtual pre-apprenticeship program and its recent enhancements and upgrades with the recent release of FRB 2.0 will be presented. The desired outcome of FRB 2.0 is to attract more pre-qualified diverse applicants to apprenticeship programs and also to engage younger individuals in early career exploration to consider careers in construction.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Describe how technology and mobile gaming can effectively attract and engage the future workforce, specifically in the highway construction industry.
- Explain why Future Road Builders 2.0 is relevant as an innovative tool to reach out to educators, parents and students to learn more about careers in the construction industry and to specifically target students who are not pursuing a four-year college degree upon finishing high school.
- Recognize how gamification can be used as a tool for career awareness.
- Utilize an app-based technology to track data on potential employees.

**Speaker(s):**

Jason Koss – Constructors Association of Western Pennsylvania

Rich Barcaskey – Constructors Association of Western Pennsylvania  
Ken Smith – Simcoach Games

**CEUs:**

0.1 IACET CEUs  
1.0 AIA Learning Unit  
1.2 CPE Credit in Computer Software & Applications  
1.0 AIC CPD Unit  
1.0 SMPS CEU

**Tuesday, February 27<sup>th</sup> 2:30 pm – 3:30 pm**

**Title:**

13. Construction Disruption: Leveraging Technology to Protect Your Bottom Line

**Category:**

Technology

**Description:**

Everywhere you look, there's a new mobile, drone or wearable device. How are these technologies evolving construction projects? How are top contractors running research and development on emerging technologies? Get ahead of the learning curve and hear about the up and coming technology solutions your peers in the industry are already utilizing. In this dynamic session, James Benham sorts through the latest trends, solutions and devices in building technologies and how they will rewrite the rules for construction projects. Mr. Benham will also discuss the statistics behind the annual Construction Technology Report, a survey of thousands of construction professionals on how they are employing and integrating technology on building projects.

Discuss real companies who are researching and implementing the latest technologies and how they are impacting their construction projects; see demos of the next generation of technology that are keeping developers busy; and review the technology tools and strategies you can implement today to be ready for the tech of tomorrow.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Describe a brief history of virtual reality, augmented reality and wearable devices.
- Explore how drones are introducing builders to data mobility, visualization, access and efficiency on projects.
- Examine how cutting edge mobile applications, sensors and web-based solutions are being integrated for use in the office and on the job site.
- Analyze case studies of how industry leaders are using innovative technology to inspire collaboration & design.

**Speaker(s):**

James Benham – JBKnowledge, Inc.

**CEUs:**

0.1 IACET CEUs  
1.0 AIA Learning Unit  
1.2 CPE Credit in Computer Software & Applications  
1.0 AIC CPD Unit  
1.0 SMPS CEU

**Title:**

14. Identifying and Negotiating the Allocation of Design Risk for Contractors

**Category:**

Insurance & Risk

**Description:**

Design flaws are a constant risk in construction. Acknowledging that threat, owners and contractors typically address the risks of design deficiencies in their project planning and contract documents. The allocation of those risks, however, can and does differ considerably from project to project. Contracting parties can better identify, negotiate, and manage transfers of design risk by understanding how and why they are commonly achieved.

This session will be an interactive, conversational panel discussion of design risks, including strategies to negotiate and mitigate those risks and predictions on future trends and how to prepare for them. The panelists will share their own specific experiences and recent court cases as examples to bring the issues to life in the context of real construction projects.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Discuss the financial and managerial motivations underlying the allocation of design risk between owners and contractors and between contractors and subcontractors.
- Identify apparent and subtle transfers of design risk in contract documents, and understand how and why they are commonly achieved.
- Negotiate fairer and more manageable contract terms concerning the risk of design errors and identifying the relevant terms in standard industry documents like ConsensusDocs and the AIA Contract Documents.
- Describe the risks that are and are not allocated to architects and engineers.

**Speaker(s):**

Doug Tabeling – Smith, Currie & Hancock LLP  
Daniel M. Carrico – Hensel Phelps Construction Company  
Fritz Hain – DPR Construction

**CEUs:**

0.1 IACET CEUs  
1.0 AIA Learning Unit  
1.2 CPE Credit in Management Services  
1.0 AIC CPD Unit  
1.0 SMPS CEU

**Title:**

15. Implementing Key Performance Indicators (KPIs): A Strategic Approach

**Category:**

Jobsite Productivity

**Description:**

Drawing upon original research from Dodge Data & Analytics (DD&A), the efforts to promote best practices by the Public/Private Industry Advisory Council (PIAC) and COAA, and the experiences of contractors who have successfully employed them, this session will provide attendees with tactical data to help them better implement, track and analyze Key Performance Indicators (KPIs) on their projects.

Several recent studies conducted by Dodge Data & Analytics reveal the risks that create uncertainty on projects and the challenges the industry faces in dealing with them. One critical strategy to do so is to create a better, more precise understanding of projects, one based on a system of metrics that allow for comparisons on performance across projects. These Key Performance Indicators (KPIs) are often recognized as important, but the challenge in collecting them and in not being overwhelmed in data can prevent contractors and the industry in general to derive the full benefit they could offer.

This session will present new research on the most effective KPIs: those considered the most valuable and those that are relatively easy to gather and analyze. These findings will be placed into the context of the work being done in this area by the Public Private Industry Advisory Council by Sue Klawans from Gilbane, and real-world discussion of implementing these effectively and how they can improve projects will also be provided by Greg Gidez from Hensel Phelps and Victor Sanvido from Southland Construction.

This session will provide insights into which KPIs would benefit contractors most while still being relatively easy to implement. It will also look at the challenges and opportunities firms face when considering the best approach to tracking KPIs, with a frank discussion of what can be learned and how to overcome resistance within the organization and best utilize the data obtained.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Benchmark your company's use of KPIs compared to what your peers are doing across the industry.
- Determine the best KPIs to consider based on the value they provide and the ease of implementation.
- Recognize how to overcome resistance within your organization about gathering the KPIs necessary to improve jobsite efficiency and project performance.
- Discuss how to overcome the obstacles of collecting and managing this data.

**Speaker(s):**

Sue Klawans – Gilbane Building Company

Victor Sanvido – Southland Industries

Steve Jones – Dodge Data & Analytics

Greg Gidez – Hensel Phelps

**CEUs:**

0.1 IACET CEUs  
1.0 AIA Learning Unit  
1.2 CPE Credit in Management Services  
1.0 AIC CPD Unit  
1.0 SMPS CEU

**Tuesday, February 27<sup>th</sup> 4:00 pm – 5:00 pm**

**Title:**

16. Innovation and Technology on a Budget: Driving ROI Inside Your Organization

**Category:**

Technology

**Description:**

Driving a culture of innovation at your organization can be a great way to increase profits on your bottom line, but the question is- at what cost? This session will discuss the keys to engaging your employees in your innovation efforts. Driving innovation from the bottom up can be a cost-efficient way to improve company best practices and processes. Often times organizations believe that innovation is an expensive effort that does not fit within their current budget, but that does not have to be the case. Using pilot projects and scaling efforts across the organization can allow teams to engage, pilot, and scale efforts on projects as necessary, encouraging employees to feel empowered to innovate processes internally. Utilizing innovation committees and think tanks can be a great way to spur forward thinking ideas and allow for knowledge sharing across the organization. Innovation can be a key component to recruiting and retaining young and top talent at your organization, so having an innovation plan can be critical to future success. Creating an innovative culture in your organization is not just the latest buzzword, but a way to ensure the future growth and success of your organization for the foreseeable future.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Develop a culture of innovation at your organization.
- Identify how to budget and fund innovation efforts within your organization.
- Discuss how to turn successful pilots into ROI by scaling them across your organization.
- Engage individuals across your entire organization and involve them in your innovation effort.

**Speaker(s):**

Kris Lengieza – Stiles Construction  
Josh Bone – Stanley Black & Decker, Inc.  
Greg Martin – The Weitz Company  
David J. Wilson – Oticon A/S

**CEUs:**

0.1 IACET CEUs  
1.0 AIA Learning Unit

1.2 CPE Credit in Computer Software & Applications  
1.0 AIC CPD Unit  
1.0 SMPS CEU

**Title:**

17. Growing Use of Dispute Resolution Boards on Highway/Civil Projects: Avoiding Disputes and Resolving Conflict

**Category:**

Highway & Utility Infrastructure

**Description:**

Disputes and claims have been a part of construction projects for many years and often drag out well after the completion of the project, tying up valuable resources and adding costs. Disputes can also lead to friction between the parties during construction. Actively managing the dispute or claim, or better yet, helping avoid the claim or dispute entirely, saves time and money for all the parties involved.

Although Dispute Review Boards (DRB) have been used for many years on transportation related projects in some states, they have seen limited or no use in other states and other heavy/civil type projects and vertical construction. Owners, engineers and others who develop the contract documents are key to getting DRB provisions incorporated into the contract. By having a DRB start at the beginning of a project, the DRB can many times help the parties avoid a dispute by being proactive with the parties in getting issues settled and avoiding a dispute altogether. If a dispute does arise, the dispute can be settled early and at the project level, which is a benefit to the parties.

This session will provide a history, overview and development of the DRB process and how a DRB can help avoid disputes or get them settled in a timely and efficient manner. The session will also give the audience an understanding of the formation and duties of the DRB, and what the parties using the DRB are expected to do.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Describe the DRB process and history.
- Define the requirements for making the DRB process an effective tool.
- Identify how DRB participants can make the best use of a DRB.
- Discuss examples of how the DRB process has helped eliminate future arbitration and litigation.

**Speaker(s):**

Wilburt H. Hinton, II – Dispute Resolution Board Foundation

**CEUs:**

0.1 IACET CEUs  
1.0 AIA Learning Unit  
1.2 CPE Credit in Management Services  
1.0 AIC CPD Unit  
1.0 SMPS CEU

**Title:**

18. Key Employees Want to Buy In, Now What? A Guide to Ownership Transition to Key Employees

**Category:**

Finance

**Description:**

In this session, panelists will identify the unique issues facing contractors in transitioning businesses to current or future employees, and will present ideas and methods to resolve some of those issues.

**Learning Objectives:**

By the end of this session, participants will be able to:

- Identify the obstacles facing ownership transition to employees.
- Recognize the amount of time required to properly plan and implement an ownership/leadership transition strategy
- Identify methods to overcome the large capital investment required by new owners.
- Determine a strategy to cash flow the transition.

**Speaker(s):**

Craig Olsen – CliftonLarsonAllen LLP

Dominic Zamora – CliftonLarsonAllen LLP

Gene Huebner – Aldridge Electric, Inc.

**CEUs:**

0.1 IACET CEUs

1.0 AIA Learning Unit

1.2 CPE Credit in Finance

1.0 AIC CPD Unit

1.0 SMPS CEU

**Continuing Education Units (CEUs):**

**Delivery Method:** Group Live

**Program Level:** Intermediate

**Advanced Preparations:** No Advanced Preparations Required

**Technology Requirements:** None



The Associated General Contractors of America (AGC) has been accredited as an Accredited Provider by the International Association for Continuing Education and Training (IACET). In obtaining this accreditation, AGC has demonstrated that it complies with the ANSI/IACET Standard which is recognized internationally as a standard of good practice. As a result of their Accredited Provider status, AGC is authorized to offer IACET CEUs for its programs that qualify under the ANSI/IACET Standard.



The Associated General Contractors of America (AGC) is a Registered Provider with The American Institute of Architects Continuing Education Systems. Credit earned on completion of this program will be reported to CES Records for AIA members. Certificates of completion for non-AIA members are available on request.



The Associated General Contractors of America (AGC) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have the final authority on the acceptance of individual course for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website:

[www.nasbaregistry.org](http://www.nasbaregistry.org).



Select sessions have been approved by the American Institute of Constructors (AIC) to offer Continuing Professional Development (CPD) units. CPD credits are always earned at the rate of one credit for every one contact hour of educational content. For more information on Continuing Professional Development, visit [www.professionalconstructor.org](http://www.professionalconstructor.org).



The Society for Marketing Professional Services (SMPS) has approved AGC of America's qualifying programs. All programs that offer SMPS CEUs, award one CEU for one contact hour.



AGC of America recognizes the 99<sup>th</sup> Annual Convention as qualifying for continuing education hours towards the renewal of AGC's Certificate of Management-Building Information Modeling (CM-BIM). Each hour of BIM-related educational content is equal to 1 hour of CE credit.

Attendees may earn up to 1.0 hour of CE Credit by attending the 99th Annual Convention.



AGC of America recognizes the 99th Annual Convention as qualifying for continuing education hours towards the renewal of AGC's Certificate of Management-Lean Construction (CM-Lean). Each hour of Lean Construction-related educational content is equal to 1 hour of CE credit.

Attendees may earn up to 1.0 hour of CE Credit by attending the 99th Annual Convention.