2018 Engineering and Construction Conference
Embracing change, elevating performance
## Wednesday, June 20
1:00 p.m.–5:00 p.m. | Registration
6:00 p.m.–8:30 p.m. | Opening reception

## Thursday, June 21
7:00 a.m.–8:00 a.m. | Breakfast
8:00 a.m.–9:30 a.m. | General session: Conference kick-off and introductions
Keynote speaker: Lt. Governor of Colorado, Donna Lynne Ballrooms A & B
9:30 a.m.–9:50 a.m. | Break
9:50 a.m.–10:50 a.m. | Breakout sessions
- Winning strategies for mitigating risk
  Central City
- Federal tax credits and incentives that make an impact
  Highlands
- Smart cities: A human-centered approach
  Brown Palace Club
10:50 a.m.–11:10 a.m. | Break
11:10 a.m.–12:10 p.m. | Breakout sessions
- Revenue recognition roundtable: Implementation insights
  Highlands
- Tax reform: Deep dive on how it applies to E&C
  Central City
- Technology disruption: Digitizing E&C
  Brown Palace Club
12:10 p.m.–12:30 p.m. | Break
12:30 p.m.–2:00 p.m. | Lunch and general session
Economic and tax legislative update Ballrooms A & B
2:00 p.m.–2:20 p.m. | Break
2:20 p.m.–3:50 p.m. | Breakout sessions
- FASB’s new lease standard: Insights for E&C companies
  Central City
- Understanding the journey to cloud for E&C
  Highlands
- Success through strategic cost transformation
  Brown Palace Club
3:50 p.m.–4:10 p.m. | Break
4:10 p.m.–5:10 p.m. | General session
M&A trends and drivers Ballrooms A & B
5:15 p.m.–6:30 p.m. | Networking and cocktails
6:30 p.m. | Dine-arounds

## Friday, June 22
7:30 a.m.–9:10 a.m. | Breakfast
9:45 a.m.–10:05 a.m. | Break
10:05 a.m.–11:20 a.m. | Breakout sessions
- Talent
  Central City
- Data-driven management for digital capital projects (dashboards)
  Brown Palace Club
11:20 a.m.–11:40 a.m. | Break and plated lunch
11:40 a.m.–12:05 p.m. | General session
Blockchain Ballrooms A & B
Dear colleagues,

On behalf of Deloitte, we welcome you to our fifth annual Engineering and Construction (E&C) Conference: Embracing change, elevating performance. The engineering and construction industry has been on quite a journey during the past decade. There are many factors that will come into play as our industry moves forward into 2018 and beyond. These include new technology being used in the industry, accounting and regulatory changes, and much more. Our conference promises to bring you insights on industry trends, challenges, and leading practices applicable to E&C companies as well as provide unique opportunities to network with your industry peers.

During the conference, you will hear our presenters speak on a broad range of topics relevant to the industry. We want these sessions to be interactive as well as insightful. We look forward to your active participation and questions during our program. In addition to our broad spectrum of agenda topics, we have organized activities for you to network with participants and speakers on site and as you enjoy the fine food and culture of Denver.

We would like to thank each of you for making time in your busy schedules to join us this year. We would also like to thank the members of our steering committee. Your insight and direction throughout the entire planning of this conference will undoubtedly make it one of our best yet!

Deloitte is dedicated to positively impacting the E&C industry by focusing on you, the leaders of this space. We look forward to an engaging and impactful conference!

Welcome

Brian Albanese, Lithko
Bona Allen, Kajima USA, Inc.
Mike Anderson, Layne Christensen
Christa Andresky, Turner Construction
Barbie Bigelow, Jacobs
Emily Gepner, AECOM
Veronica Lubatkin, Railworks
Tony Mirchandani, RTM Associates
Kirk Rabius, AECOM
Sue Sonnefeldt, Perkins Will
Jon-Paul Weiss, Comfort Systems
Chris Kruegem, McDermott

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5. Enter password: deloitte (case sensitive).
6. Enter company name and title or connect to your LinkedIn, Facebook, and Twitter social accounts to post directly from the app.
7. Navigate through the app to find information on agenda, speakers, thoughtware, and much more.
Keynote speaker: Dr. Donna Lynne
Colorado Lieutenant Governor and Chief Operating Officer

This year’s keynote speaker is Colorado Lieutenant Governor and Chief Operating Officer, Dr. Donna Lynne. Donna Lynne, DrPH, is Colorado’s 49th Lieutenant governor and chief operating officer, (COD). She works closely with the governor and cabinet to drive better performance, accountability, and transparency throughout state government operations. Prior to her roles in Colorado state government, Dr. Lynne served as the executive vice president of Kaiser Foundation Health Plan Inc. and group president of Kaiser Foundation Hospitals.

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Surabhi has been with Deloitte for more than eight years. She is the real estate research leader at the Deloitte Center for Financial Services where she is responsible for driving eminence and thought leadership for the Real Estate and Construction practice. Surabhi has authored several real estate and construction thoughtware papers and also provided strategic insights to clients to help solve their business issues. She has diverse research experience across the financial services, retail, leisure, and restaurant industries. Among other publications, Surabhi has contributed significantly to the annual real estate industry outlooks. She is a Chartered Accountant (equivalent of a CPA) from India.

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Rob is the national co-leader of Deloitte’s E&C practice. He has more than 20 years of experience in tax consulting and concentrates on tax provisions, consolidated tax returns, corporate reorganizations, tax incentives, and accounting methods of large public multinational companies. Rob has spent his entire career working with large engineering, architecture, and construction firms; as a result, his tax technical background is focused on a wide range of industry-related projects, including design and build infrastructure contracts for federal, state, and international agencies; operation and maintenance contracts of government facilities; design, build, and operation of chemical weapon decommissioning sites, demolition contracts, remediation of contaminated land, and public-private partnerships. He has a bachelor’s degree in accounting from the University of San Diego and a master’s degree in taxation from San Diego State University.

General session
Conference kick-off and introductions

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General session
Conference kick-off and introductions
Michelle Meisels is a principal in Deloitte Consulting’s Technology practice and leads its Engineering & Construction practice. Michelle brings more than 24 years of consulting experience with a focus on leading large, often global, finance and IT transformation programs by leveraging technology. She helps clients integrate best-in-class technologies with organizational and process standard practices to achieve both qualitative and quantitative benefits. She specializes in JDE, EBS, and Cloud. While she has served clients across many industries, her primary focus has been serving engineering and construction companies. Michelle has served many global E&C companies throughout her career, such as AECOM, URS, Earth Tech, Worley, Parsons, and MWH. Michelle was born and raised in Southern California and graduated from UCLA.
Breakout session
Winning strategies for mitigating risk

In almost all aspects of their business, engineering and construction (E&C) firms are facing risks spanning multiple functions. Managing these risks well can mean the difference between growth and profitability and contraction. This session will focus on several key risks and leading mitigation strategies successful E&C companies are employing in three key areas: financial management, project management, and insurance.

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Mark has more than 30 years of experience in the design, construction, and management of major capital projects and programs. Mark's experience includes strategy and operations and process improvement services for E&C companies as well as construction cost assessments, project management oversight, and litigation support for major public- and private-sector construction projects. Mark is a frequent speaker and trainer on construction fraud prevention and detection, construction auditing, and contracting strategy and project delivery. He holds a BS in civil engineering from Union College and a MBA from the City University of New York.

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With more than 31 years of insurance experience, Ed provides support to corporate insurance buyers in the areas of insurance program design and departmental organization across a broad range of industry sectors. He has worked on designing and analyzing contractor-controlled and owner-controlled insurance programs for wrap-ups, as well as rolling wrap-up programs, frequently using captive insurers. Ed joined Deloitte after long careers with Johnson & Higgins and Marsh & McLennan, both major insurance brokerage firms. He also served as risk manager for American Express Company. Ed received his BA in economics from Columbia University and his MBA in finance from New York University. He has served on the board of directors of the Vermont Captive Insurance Association and is currently on the faculty of the International Center for Captive Insurance Education.

Michael A. Hostettler
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Michael is a leader in Deloitte’s Capital Projects Consulting group. He has more than 35 years of experience in the construction, engineering, real estate, and capital improvement segments across a range of industries: public works, commercial and industrial development, energy, technology, and heavy industrial manufacturing. In the E&C sector, Michael has held a variety of positions, including estimator, field engineer, superintendent, legal counsel, and consultant on economic damage, delay analysis, operational valuation and assessment, dispute resolution, and process improvement. He received a BS in construction from Purdue University and a JD from Case Western Reserve University School of Law.
Matthew Murch
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Matt has more than 15 years of experience providing capital projects advisory services. Over the course of his career, Matt has focused on the development and management of major infrastructure programs across numerous vertical industries, including transportation, power and utilities, public works, and telecommunications. He has worked with major public agencies as well as Fortune 500 clients to plan and implement hundreds of billions of dollars in capital investments in such areas as project prioritization, funding and financing, disaster recovery and resiliency, capital project management technology, business process design, operating models, and organizational assessments. A graduate of the University of Michigan, Matt holds BS and MS degrees in engineering. In addition, he is certified as a Project Management Professional by the Project Management Institute.
Breakout session
Federal tax credits and incentives that make an impact

Federal and state tax jurisdictions offer a number of tax credits and incentives that engineering and construction (E&C) firms can use to reduce environmental tax reform (ETR), provide cash benefits, and support growth. This session will focus on recent developments specific to the E&C community and the available federal and state credits and incentives such as the foreign derived intangible income (FDII) deduction that provides taxpayers the potential for an up to nine percent permanent rate benefit, research and development tax credits, employee retention credits under the Hurricane Relief Act, family and medical leave act (FMLA) credits, work opportunity tax credits (WOTC), and other hiring and training grants and incentives. Credits and incentives, generally, receive more scrutiny from the IRS and state tax authorities, and we will spend time during this session to discuss and understand the federal and state exam environment and trends.

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Nati is a senior manager in the Deloitte Tax LLP National Multistate Tax Services practice, specializing in identifying, qualifying, negotiating, and implementing business credits and incentives. Nati has worked with clients in a variety of industries and has negotiated and secured a broad spectrum of tax and non-tax incentives. He has worked closely with companies to ensure compliance with reporting requirements associated with benefits secured. Additionally, Nati has experience in state and local income/franchise tax compliance and consulting. Over the past 12 years, Nati has represented clients in the manufacturing (both automotive and non-automotive), health care, technology, and retail and consumer products industries.

Nati received his BS and MS in accounting from Walsh College of Accountancy and Business Administration in Troy, MI. In addition, Nati is a licensed CPA in Arizona and Michigan and is also admitted to practice before the Internal Revenue Service. Nati is a member of the American Institute of Certified Public Accountants, the Arizona Society of Certified Public Accountants, and the Institute of Professionals in Taxation.

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Jarick is a senior manager in the Global Investment & Innovation Incentives group of Deloitte Tax LLP. He has 13 years of professional experience in public accounting including federal income tax areas such as research and experimentation and IRS examination defense. Since 2004, Jarick has primarily advised clients in tax credit structuring and syndication for the New Markets Tax Credit Program. His clients include large financial institutions, engineering firms, construction firms, nonprofit organizations, manufacturers, retailers, municipalities, and real estate developers. A graduate of Brigham Young University, Jarick has a BS in accounting and an MS in accounting with an emphasis in taxation.
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Jennifer Voorhees is a tax partner in the Chicago office and is part of Deloitte’s International Compliance and Reporting Services group. Jennifer has more than 16 years of experience providing consulting, planning and compliance services to clients in the oil and gas, manufacturing, technology, and engineering and construction industries. She previously spent 10 years assisting clients with Section 199. She has a bachelor’s degree in accounting and finance and a master’s degree in accounting from the University of Nebraska—Lincoln.

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Laura is the St. Louis Office Tax Managing Partner and a part of Deloitte’s National Global Investment & Innovation Incentives (Gi3) Tax Services group, which includes more than 220 professionals in the US dedicated to federal credits and incentives work. She has more than 16 years of experience performing and leading R&D tax credit analysis and serves as the Gi3 national service line industry leader for E&C. She has managed and led all aspects of credit claims, including conducting interviews, reviewing IRC 41 qualification memorandums, developing comprehensive cost collection strategies, responding to IRS audit exam issues, and negotiating settlements at appeals. A graduate of the University of Missouri-Columbia and a member of the Accountancy Advisory Board, Laura received a BS cum laude in accounting and a master’s degree in accounting.
Breakout session
Smart cities: A human-centered approach

For smart cities to take a human-centered approach, they must focus on quality of life, economic competitiveness, and sustainability. This session will address the trends and opportunities for engineering and construction (E&C) companies as they view this trend, from global convergence to the impact on global indirect taxes (sales and use taxes, excise taxes, and value added tax (VAT)) to other tax and non-tax incentives.

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Rana is a managing director in Deloitte Consulting LLP’s Public Sector practice and has 20 years of experience in implementing and leading major government transformation initiatives in public health, human services, transportation, smart city, and finance and administration. His work with government agencies includes development of strategic smart city roadmaps, implementation of smart transportation solutions, operations and maintenance of one of the largest civilian financial administration solutions for the federal government, and automation of long-term care case management for the disabled and aged population. Rana has delivered speeches in multiple national and international forums and has authored several publications on smart city. He has an undergraduate degree in architecture and graduate degrees in construction science and management and computation design.

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Michael, a managing director in our Indirect Tax Services practice, is based in San Francisco. He has more than 25 years of federal and multistate tax experience with Deloitte Tax LLP, including consolidated returns, multistate restructuring, state apportionment, filing methodologies, credits and incentives and indirect tax. Michael and his team advise clients on the nuances of indirect tax issues, related to sales and use tax, federal and state excise tax, gross receipts tax, local tax, and foreign indirect tax. Michael’s tenure at Deloitte has given him a deep knowledge of Deloitte’s tax technical resources from a national and international perspective. This knowledge enables Michael to efficiently identify, develop, and implement opportunities that bring value to his clients in the federal, state and local income and franchise tax, and indirect tax areas. Michael has worked with Fortune 1000 companies from the retail, financial services, engineering and construction, aerospace and defense, life sciences, health care, technology, media and telecommunications, manufacturing, alternative energy, and service industries.

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Bruce is a managing director in Deloitte Tax’s National Multistate practice. Bruce is the West Coast leader of Deloitte's National Credits and Incentives practice and has focused on credits and incentives for the last 16 years. Bruce’s experience includes negotiations, site selection, tax advice, incentive compliance, and audit defense. Bruce works with state, local, and municipal departments along with economic development agencies in connection with structural changes, expansions (including retention), capital investments (including sustainability related investments) to negotiate incentives, typically including financing assistance, income tax credits, job credits, training grants, sales and use tax benefits, property tax abatements, and other in-kind benefits. Bruce earned a Bachelor of Science from the George Washington University and a Juris Doctor from the University of Miami School of Law.

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Breakout session
Revenue recognition roundtable: Implementation insights

The new revenue recognition standard (ASC 606) has been implemented by public companies, and implementation activities for private companies are in full swing. This round-table discussion will offer perspectives from company representatives who managed the implementation process and from Deloitte professionals who have helped companies through the successful implementation of ASC 606. Round-table participants will share best practices, pitfalls encountered, and lessons learned during implementation efforts related to accounting conclusions, internal controls, information technology systems, tax, and project management.

Russell Wright
Senior Technical Accounting Manager
McDermott International Inc.
Russell has led Technical Accounting for McDermott International Inc. since September 2016. In this role Russell oversees the adoption of new accounting standards and the accounting for complex transactions. Prior to McDermott, Russell was a senior manager in Deloitte’s Energy and Resources Audit practice, serving both publicly traded and privately held companies. While at Deloitte, Russell served two years in a National Office role supporting the technical initiatives for the energy and resources industry. Russell earned a Bachelor of Science in business administration—accounting and Master of Science in accounting from Texas A&M University.

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Rik is a Deloitte Advisory specialist leader in Deloitte & Touche LLP and also serves as a real estate industry point of contact for the Financial Risk, Transactions & Restructuring market offering. Throughout his 30-year career, Rik has led dozens of acquisition, integration, and carve-out transactions ranging from $20 million to $22 billion in assets. He has also led initial public filing and registration initiatives for stock and debt offerings. In addition to Deloitte, he possesses an additional 10 years of public accounting experience supporting audit engagements in insurance, banking, and investment funds. Prior to joining Deloitte in 2015, Rik served in controllership roles with a number of international financial services organizations, including Capmark Financial Group, AIG, General Electric, and MBNA. In addition to considerable US GAAP, SEC, and regulator financial reporting experience, Rik has led teams through internal restructuring, process improvement, accounting standard implementation (derivatives and fair value), structured finance transactions, and bankruptcy accounting and reporting.

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Breakout session
Tax reform: Deep dive on how it applies to E&C

The recently enacted tax reform bill lowers tax rates on corporations, pass-through entities, individuals, and estates. Concurrently, it also moves the US toward a participation exemption style system for taxing foreign-source income of domestic multinational corporations. Some of the cost of tax relief is offset by provisions that scale back or eliminate many longstanding deductions, credits, and incentives for businesses and individuals, with the remainder of the costs added to the deficit. In this session, you will learn how the new domestic and international rules apply to E&C firms, what others are doing to implement the new rules, as well as the perspectives of your peers.

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Dave is a senior manager in our San Francisco Business Tax Services practice with more than 10 years of experience with Deloitte Tax. He has extensive experience in advising P3 clients with respect to the numerous complex tax and reporting issues associated with such transactions. Additionally, he has served a number of energy and construction clients addressing concerns surrounding tax issues typically found in the energy and construction space (i.e., revenue recognition, etc.). Dave previously worked in Deloitte’s M&A Transaction Services group assisting multinational companies with tax due diligence and structuring services, including transactions in the energy and construction space.

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Paola has been with Deloitte for more than eight years, specializing in conducting strategic tax reviews to identify and implement federal income tax planning opportunities, such as asset class reclassifications and compliance with tangible property regulations. She also advises clients on tax accounting methods, such as revenue recognition and deduction of accrued expenses. Her experience spans multiple industries, including retail, manufacturing, life sciences, media, and electric utilities. Paola holds a BS in accounting and business management from Barton College and an MS in taxation from Pace University.

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With more than 31 years of insurance experience, Ed provides support to corporate insurance buyers in the areas of insurance program design and departmental organization across a broad range of industry sectors. He has worked on designing and analyzing contractor-controlled and owner-controlled insurance programs for wrap-ups, as well as rolling wrap-up programs, frequently using captive insurers. Ed joined Deloitte after long careers with Johnson & Higgins and Marsh & McLennan, both major insurance brokerage firms. He also served as risk manager for American Express Company. Ed received his BA in economics from Columbia University and his MBA in finance from New York University. He has served on the board of directors of the Vermont Captive Insurance Association and is currently on the faculty of the International Center for Captive Insurance Education.
Breakout session
Technology disruption: Digitizing E&C

What devices will we wear in the future to help us do work? Are we ready to accept decisions made by machines? Technology that seemed unrealistic a few years ago is becoming a reality. How can engineering and construction (E&C) companies incorporate technology into their business without disrupting operations? Join our session to get insight on how you can boost margins, increase productivity, and reduce costs by using the latest technologies such as building information modeling (BIM), virtual reality (VR), robotic process automation, and digital finance.

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As one of the leaders of Deloitte Consulting’s E&C Practice, Tom has been delivering technology solutions in the E&C and facilities management industries for more than 20 years. He helps clients understand the impact to their business in a constantly changing technology world by applying tech fluency to clients’ most pressing business opportunities using the latest in ERP, E&C systems, cloud, mobile, and IoT solutions. Prior to joining Deloitte in 2000, Tom worked in industry with Fluor Daniel GTI and The IT Corporation. He earned a BS degree in geology from the University of Rhode Island and an MBA from the University of Massachusetts Dartmouth.

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Nitin has more than 23 years of experience which includes six years of E&C industry experience and 18 years of large-scale global Oracle technology-enabled supply chain transformation project experience for E&C, industrial manufacturing, and consumer products clients. He brings value to clients by delivering process maturing and capabilities-driven business transformation in supply chain, sourcing, customer service, shared services, enterprise asset management, and finance areas. In addition, Nitin has led large M&A integrations and divestiture projects. Nitin currently leads Oracle JDE IoT solution capabilities.

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Nathan has more than 15 years of engineering and construction technology experience. He has deep information systems experience in Oracle JD Edwards and experience with telematics, fleet management, preventive maintenance, forecasting, and scheduling systems. He also has extensive experience in E&C business process redesign, technology implementations, software selection, and project management. Nathan is a specialist leader in Deloitte’s Engineering & Construction practice and is aligned with Oracle Enterprise Solutions. He has been with Deloitte for more than six years and has serviced clients in the engineering and construction, life sciences, and consumer and industrial products industries. Prior to working with Deloitte, he worked in industry with E&C and homebuilder organizations. He currently lives in Denver, Colorado. Nathan holds a BS in accountancy from Arizona State University and has his CPA and PMP certifications.

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As one of the leaders of Deloitte Consulting’s E&C Practice, Tom has been delivering technology solutions in the E&C and facilities management industries for more than 20 years. He helps clients understand the impact to their business in a constantly changing technology world by applying tech fluency to clients’ most pressing business opportunities using the latest in ERP, E&C systems, cloud, mobile, and IoT solutions. Prior to joining Deloitte in 2000, Tom worked in industry with Fluor Daniel GTI and The IT Corporation. He earned a BS degree in geology from the University of Rhode Island and an MBA from the University of Massachusetts Dartmouth.
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Hrishikesh Valsangkar is finance transformation consultant and specializes in architecting solutions for complex business issues and requirements. He has led large and complex projects with the focus on the oil and gas industry and specializes in the ERP and robotics technologies. He is part of the Oracle Package Technologies group within Deloitte’s Technology consulting practice. He has more than 18 years of experience ranging from process design, re-engineering, standardization, automation and optimization, management reporting strategy, IT roadmaps, and project management. He also brings deep experience and expertise in oil and gas accounting (JVA, intercompany accounting), foreign currency translation, transaction taxes, financial consolidation, and reporting.
General session
Economic and tax legislative update: Outlook for interest rates and currency values

Ira Kalish, the chief global economist at Deloitte, and Jonathan Traub, managing principal of Deloitte’s Tax Policy Group, will share their perspectives about the current economic, political, and tax environment on the engineering and construction (E&C) industry for this year and beyond. Ira will analyze recent and emerging trends and geopolitical developments in the US and global economies and how they may impact E&C. He will also address the outlook and impact of infrastructure spend in the US. Jon will examine the 2017 US tax package, the outlook for additional changes, as well as the status of additional federal tax legislation and the possible state tax reform. Ira and Jon will also discuss the impact of the current administration on non-US firms doing business here and the possible repatriation of offshore earnings.

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Ira is the chief global economist of Deloitte Touche Tohmatsu Limited. He is a specialist in global economic issues as well as the effects of economic, demographic, and social trends on the global business environment. He has written about the economies of Western Europe, Eastern Europe, Southeast Asia, China, Japan, Mexico, and South America, and has also written extensively on global consumer markets. Ira advises Deloitte clients as well as Deloitte’s leadership on economic issues and their impact on business strategy. He also serves on the Business and Industry Advisory Committee’s Economic Policy Committee, which advises the Organization for Economic Cooperation and Development on macroeconomic policy issues. Ira holds a bachelor’s degree in economics from Vassar College and a PhD in international economics from Johns Hopkins University.

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Jon joined the Washington National Tax practice of Deloitte Tax LLP in 2012 as managing principal of its Tax Policy Group. With extensive experience in the legislative arena, Jon is able to provide clients with critical insights on developments in tax policy and politics, helping them anticipate legislation and the potential impacts on their businesses. Before coming to Deloitte, Jon served as staff director for the Committee on Ways and Means of the US House of Representatives, where he was responsible for developing legislative policies and strategy on issues in the Committee’s jurisdiction, including taxes, health care, and trade. He received his BA from Haverford College and JD from the University of Virginia.
Breakout session
FASB’s new lease standard: Insights for E&C companies

If you expect a break after implementing the FASB standard for revenue from contracts with customers, you might not get one. This session will take a look at the new lease accounting standard, which is effective for public companies with years beginning after December 15, 2018, and for private companies the following year. This new standard redefines a lease and will present large scale changes and challenges to the construction industry. Join us for an overview and discussion of technology solutions that can aid in implementation and future data maintenance of the new standard. We will also highlight how the lease accounting standard may impact your taxes and how to leverage the lessons learned from recent revenue standard implementations.

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Tim is a senior manager in Deloitte & Touche LLP’s National Office Accounting Services Group, which is located in Stamford, Connecticut. In this role, he monitors the activities of the various accounting standard-setting and regulatory organizations, updates firm guidance, supports engagement teams on technical accounting matters, and writes internal and external publications. Tim’s primary areas of specialization include lease accounting. He is one of the firm’s leaders on the new lease accounting requirements in ASC 842 and IFRS 16. In this role, he engages in discussions with the other large firms as well as the FASB and SEC staffs on interpreting the guidance. Tim graduated from LaSalle University with a Bachelor of Science Degree in business administration with a focus in accounting.

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Rik is a Deloitte Advisory specialist leader in Deloitte & Touche LLP and also serves as real estate industry point of contact for the Financial Risk, Transactions & Restructuring market offering. Throughout his 30-year career, Rik has led dozens of acquisition, integration, and carve-out transactions ranging from $20 million to $22 billion in assets. He has also led initial public filing and registration initiatives for stock and debt offerings. In addition to Deloitte, he possesses an additional 10 years of public accounting experience supporting audit engagements in insurance, banking, and investment funds. Prior to joining Deloitte in 2015, Rik served in controller’s roles with a number of international financial services organizations, including Capmark Financial Group, AIG, General Electric, and MBNA. In addition to considerable US GAAP, SEC, and regulator financial reporting experience, Rik has led teams through internal restructuring, process improvement, accounting standard implementation (derivatives and fair value), structured finance transactions, and bankruptcy accounting and reporting.

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Paola has been with Deloitte for more than eight years, specializing in conducting strategic tax reviews to identify and implement federal income tax planning opportunities, such as asset class reclassifications and compliance with tangible property regulations. She also advises clients on tax accounting methods, such as revenue recognition and deduction of accrued expenses. Her experience spans multiple industries, including retail, manufacturing, life sciences, media, and electric utilities. Paola holds a BS in accounting and business management from Barton College and an MS in taxation from Pace University.
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Clint has more than 20 years of experience advising and serving clients in the engineering, construction, manufacturing, and commodities industries that range in size from large, global businesses to small, family-owned operations. He has developed a broad base of knowledge that has been focused over the past 15 years with engineering and construction companies which has led him to serve as a resource to identify and enhance the services Deloitte delivers to existing and prospective clients. Clint continues to support engineering and construction companies with their implementation of ASC 606 / IFRS 15 and with their focus on ASC 842/IFRS 16. Clint holds a BA in accountancy from Truman State University.
Breakout session
Understanding the journey to cloud for E&C

The cloud is revolutionizing the way engineering and construction (E&C) companies are managing their businesses, with cloud solutions fast approaching the functional capabilities of on-premise ERP. E&C companies should think about a cloud strategy for the not-so-distant future. This session will discuss how to move from legacy software, “tier 2” ERP, or on-premise ERP to an expansive new horizon of cloud that comprises application, platform, and infrastructure (SaaS, PaaS, and IaaS) solutions. We will also discuss different paths to the cloud and how companies might want to choose their journey by using a cloud transition process. In addition, we will explore various capabilities/offerings as well as current functionality gaps of cloud solutions for E&C companies across packages.

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Vamsi has 18 years of experience leading large-scale global technology end-to-end ERP transformations. He is a “cloud evangelist” delivering on both strategic and tactical issues in project-centric organizations across all industry verticals. Vamsi leads many Oracle Cloud initiatives towards building “go to market” solutions for E&C companies. In his role, he has expertise in global multi-country, large-scale deployments across all process capabilities for both project and non-project-based organizations. He received a bachelor’s degree in commerce from Andhra University in India. A Certified Management Accountant (CMA) and CA, Vamsi received his bachelor’s degree in commerce from Andhra University in India.

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Greg is a senior manager focusing on Oracle Package Technologies. Greg has more than 20 years of experience in financial, accounting, and IT environments. He has driven business process design, system strategies, implementations, merger integration, and enhancements of various Oracle Financials and EPM modules. He also has experience integrating operational and industry-specific applications to Oracle in E&C, power and utilities, financial services, and professional services. Greg received BA degrees in accounting and finance from Loras College.

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Mike is a leader in Deloitte’s HR Transformation practice focusing on large-scale global digital HR and technology modernization. He has more than 10 years of experience working with clients to develop digital technology strategies for their HR service delivery and technology transformations. Mike advises his clients on what it means to transform to a digital HR organization, as well as helps them to make informed decisions on migrating their global HR technology ecosystem to the cloud. His main focus is helping organizations to better engage their employees and applicants, leverage continuous innovation with service delivery strategy and technology, and become more sustainable and adaptable in response to the workforce and business disruptions they are experiencing today.
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Breakout session
Success through strategic cost transformation

With the industry facing increased pressure to drive up margins and many players performing below their profitability potential, there is an industry-wide focus on cost. This session will describe how engineering and construction (E&C) companies can drive value creation and operational improvement opportunities through strategies as wide-ranging as cost transparency; identification and engagement of the complete supply market; supplier collaboration and development; product complexity management; value analysis and engineering; and compliance and risk management.

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Jerry is a principal in the Strategy & Operations practice of Deloitte Consulting LLP. He has 24 years of consulting experience and has served as the leader of Deloitte’s Strategic Cost Transformation practice in the US and globally. Jerry has served clients across a number of industries including real estate, life sciences, high tech, media, consumer packaged goods, financial services, retail, and mining, advising senior executives on a broad array of cost transformation initiatives including: operating model, service delivery model, supply chain, pricing, customer profitability/margin improvement, and automation. For the last several years, Jerry has served as an executive coach to numerous senior executives as they have led their company’s cost transformation agendas. Jerry earned an MBA from the Case Western Reserve University as well as a BS in Economics from Allegheny College.

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Faisal is the Operations Transformation Practice Lead for Deloitte Consulting’s Global Manufacturing Sector (Industrial Products & Construction Chemicals, and Aerospace & Defense) and he serves as Deloitte’s lead client service and consulting partner for manufacturing companies. He has deep experience in end-to-end transformation/ performance improvement programs, including go-to-market and operating model, operations, and back-office (HR, IT, F&A, legal, etc.) support functions.
General session
M&A trends and drivers

Engineering and construction (E&C) firms are increasingly turning to mergers and acquisitions (M&A) to fuel their growth. This session will start with a discussion of E&C M&A trends as well as key takeaways from the M&A workshop, followed by a panel discussion of M&A best practices.

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Eric is head of Deloitte Corporate Finance LLC’s (DCF) E&C efforts. Prior to joining DCF, Eric served as a managing director and co-founding partner at McColl Partners, LLC. There he served as co-head of the firm’s Infrastructure & Industrials Group. Eric’s transaction experience includes buy-side and sell-side assignments within numerous sectors of the infrastructure, industrials, and business services industries, including energy services, building products, commercial services, consulting, database services, education and training, printing and packaging, and rental services. He holds a BA in finance from the University of Rhode Island and an MBA from the University of North Carolina at Chapel Hill.

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With more than 31 years of consulting experience, including 18 with Deloitte, Mark has assisted more than 200 companies with a variety of IT-related initiatives. Over the past decade, he has figured prominently in Deloitte’s M&A Transaction Services practice, providing IT assessment and process improvement services for more than 500 transactions. Mark’s broad industry background includes E&C services, consumer business, technology, manufacturing, media, and financial services. As the leader of Deloitte’s IT Due Diligence practice, Mark has participated in transactions involving clients and targets from the United States, Canada, Central and South America, India, Japan, and China. A graduate of Tulane University, Mark has a BA in engineering and an MBA in management science and international business.

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Bryan has extensive experience providing merger and acquisition support to corporate and private equity buyers and sellers. Bryan is recognized as a specialist in E&C and his experience with transactions in these industries includes general, specialty, and self-performing contractors as well as design and engineering firms. Prior to joining Deloitte, Bryan served as the controller of a Boston-based construction contractor and has significant government contracting experience. Bryan is a licensed CPA in the state of Massachusetts, and a member of the AICPA and the Massachusetts Society of CPAs. Bryan is a graduate of the University of Richmond where he received a BS in business administration—accounting.
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Rob is a senior manager in the New Jersey office of Deloitte Financial Advisory Services LLP’s E&C Consulting practice. He has more than 25 years of experience in the engineering, construction, and environmental industry, both internationally and in North America. Rob is a registered professional engineer and prior to joining Deloitte, Rob spent 18 years with engineering and construction firms as an engineer, project manager, and program manager. Rob has extensive experience in the resolution of construction disputes, preparation of construction claims, and provision of litigation support. He also performs external audit specialist support, merger and acquisition support, construction cost assessments, construction fraud and forensic investigations, contract closeout assessments and cost recovery actions, unforeseen site conditions, change orders, and advisory services on capital programs/program management offices. He received a BS degree in civil engineering from Virginia Tech.

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Todd is an accounting managing director with Deloitte’s M&A Transaction Services practice. He has more than 30 years of experience with the firm, including more than 17 years as a dedicated M&A specialist. Todd has extensive transaction experience in advising financial and strategic buyers on due diligence, accounting structuring, and financial reporting aspects of transactions in the infrastructure, construction, and energy industries. He also has worked on wide array of deals for both strategic and private equity clients. He received a BS in accounting from Purdue University.
Globalization presents exciting opportunities and unique challenges for engineering and construction (E&C) firms. In this session, a mixed panel of Deloitte professionals and E&C C-suite will provide insights into doing business around the world. Local country experts from Canada, the United Kingdom, India, and China will discuss local trends, regulatory issues, and share their experiences on what going global means for you.

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Helen is a director in our UK tax practice based in Manchester. Helen has more than 14 years corporate tax experience and is the director on several of our large international tax clients. She works with multinational groups (primarily US parented), supporting her clients with international and domestic tax matters spanning transaction support, working with tax authorities, reorganizations, and compliance and reporting obligations. Helen also works on our Services Industry team, with a focus on infrastructure and engineering and construction, working with clients that include CH2M Hill and AECOM. Helen graduated from Warwick University with an Honors Degree in economics. Helen is also an ACA (Chartered Accountant) and a Chartered Tax Advisor (Chartered Institute of Taxation) (2009).

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Richard Ho is an audit partner of Deloitte China and joined the Hong Kong Practice in 1984. His clients are mostly involved in property development and investment, construction, and engineering. Richard is the leader of Deloitte China Real Estate Industry Practice and also a member of Deloitte’s Global Real Estate Executive Committee. He is presently president of the Advisory Council of the Hong Kong Real Estate Property Federation and a member of the Appeal Board of the Hong Kong Green Building Council Certification Schemes. Richard has a bachelor’s degree in financial administration and master’s degrees in international real estate and financial management, respectively. He also studied accounting and banking at post-graduate level.

**Robert Claiborne**
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Robert is an award-winning architect with many years of international experience. Originally from California, he has worked in Berlin, Germany for nine years, Montreal for 14, and for the past four years in Calgary, Alberta. His focus has been on large cultural and institutional projects including museums, concert halls, and university academic buildings. Notably for the conference here in Denver, Robert was the lead designer in Daniel Libeskind’s studio for the Denver Art Museum, Fred Hamilton Wing. As a design principal in Dialog, Robert has built a portfolio including the Glenbow Museum, The Whyte Museum of the Canadian Rockies, The Military Museums of Alberta, and most recently, the MacKinnie Complex at the University of Calgary, an assemblage of buildings that bring both design and net zero aspirations to the center of the campus. Robert is also deeply involved in Dialog’s San Francisco office; their first foray into the US marketplace.

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Hemal has more than 19 years of experience in the tax field and has been specializing in M&A, private equity, and real estate space for more than 12 years. Hemal heads the Financial Services Tax and Regulatory Practice of the firm and focuses on growing the M&A, Private Equity, Real Estate, and Infrastructure Tax Practice. Prior to joining Deloitte, Hemal has spent 10 years with KPMG, where he was an integral part of the Real Estate tax team and working extensively on restructuring, mergers, deals, fund structuring, carry structuring, etc. Hemal has spoken at many conferences on topics related to industries like real estate, infrastructure, and energy and on various topics like funds, M&A, restructuring, regulatory, etc.

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With more than 16 years of experience, Bessy has led a number of tax engagements for some of Deloitte Canada’s most significant engineering clients. She has advised on a variety of Canadian and international tax issues, including acquisition/divestiture strategies, cross-border expansion, alternative financing arrangements, and executive compensation. Bessy has a BBA from York University in Toronto as well as a Master’s in taxation from the University of Waterloo.
A profound shift is facing business leaders worldwide: The rapid rise of the social enterprise, reflecting the growing importance of social capital in shaping an organization’s purpose, guiding its relationships with stakeholders, influencing its ultimate success or failure, and tracking the data to support compliance. Technological and social forces are transforming how work gets done, who does it, and even what work looks like. In this session we will highlight the rise of the social enterprise, identifying top trends in human resources and what business leaders need to be aware of to navigate the seismic shifts transforming human capital. We will also explore through an engineering and construction (E&C) case study leveraging data analytics to increase compliance and mitigate risk for business travelers in a new highly mobile workforce.

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Lorraine is a partner in the Global Employment Services (GES) practice for Deloitte Tax LLP in San Francisco. She has more than 28 years of experience serving global companies including expatriate tax program management consulting and compliance, tax planning, and human resource policy consulting. Lorraine is the national leader for Deloitte’s Business Travel Analytics service offering. She has developed the approach and methodology for this service for Deloitte Tax globally. She has been a frequent speaker on business traveler issues for many years. Lorraine has extensive experience with respect to the management of international mobility policies, multi-country tax planning, payroll compliance, and compensation structuring for many large multinational clients. Responsibilities also include coordination of US and local-country tax compliance and consulting services for clients worldwide. She also has experience in the area of global equity consulting including tax and legal due diligence, assistance with local approvals and filings, and employee communications. Lorraine has a Bachelor of Science from the University of California, Davis and is a California Certified Public Accountant.

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Brian is the managing director of Deloitte’s Workforce Strategy & Insights Practice in Deloitte’s Human Capital practice, who specializes in helping clients transform their business and improve their global workforce management capabilities. He has more than 15 years of human capital management outsourcing advisory, transformation, and service delivery experience. During his career, he has led many transformation initiatives, developing an expertise in global payroll, HR, and time management. He also has extensive experience in business case development, vendor selection, contract negotiation, transformation planning, global policy definition, and global deployments. He has provided strategic advice and counsel to clients across multiple industries with an emphasis in financial services and the banking sector for the past several years, working with several large banks and payment organizations.
Breakout session
Data-driven management for digital capital projects (dashboards)

Construction projects and budgets are under scrutiny, requiring increased transparency, accountability, and accessibility to information. Combined with an influx of data from emerging technologies, the challenge for executives is to transform this information into insight and to promote data-driven decisions while balancing increased demands and limited resources. Implementation of project management solutions within capital programs often leads to redundant tracking from multiple systems and decreased data quality from disconnected systems. Various data sources hinder managers from prioritizing, understanding, and reporting project performance. This session focuses on analytical and data visualization solutions tailored to the construction industry that can help summarize performance, provide deeper insights, and highlight previously unknown risks, all of which are critical in managing complex construction portfolios. Join us to learn how maintaining access to construction analytics based on readily available data sets provides owners with rapid and reliable snapshots of project performance along with predictive indicators, allowing business owners to more effectively monitor projects and identify risks.

Dave Anderson
Chief Technology Officer
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David Anderson is the chief technology officer for DTN, a private equity owned global analytics and business insight firm. He is responsible for all client-facing product development, data management platforms, shared services solutions, and infrastructure. DTN exists to empower businesses and consumers in the energy, agriculture, transportation, and weather industries through the use of real-time analytics. David was previously senior vice president and global chief information officer for CH2M. In this role he had full responsibility for the delivery of CH2M’s digital and information management strategies, enterprise-wide application and cybersecurity programs, and the technology infrastructure and operational services supporting all business functions. David has more than 30 years of information technology experience, his previous 10 as the group vice president for Oracle Corporation’s Global Services, Transportation, and Construction business unit. Prior to joining Oracle, he led the Engineering & Construction management consulting practice for Ernst & Young, working directly with top global firms. Other positions include director of Product Strategy and Development for Microsoft-based Solomon Software and information technology director for OHM Corporation. He is currently on the board of directors for the National Cybersecurity Center and the Colorado Technology Association. Recent honors: 2016 Colorado Technology Executive of the Year, 2016 Colorado Top 10 Technology Business Leader, and 2014 Colorado CIO of the Year.

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Kevin is a lead partner in Deloitte Consulting's Analytics & Information Management Practice. Kevin specializes in robotic and cognitive solutions and advanced data and analytics including the use of robotic and cognitive automation (RPA), cognitive and artificial intelligence solutions, data science, predictive modeling, big data platforms, and enterprise information management architectures. Kevin has 28+ years in the industry leading efforts to successfully design and deploy cognitive and analytics solutions including on premises and cloud-based environments using in house, AMS and “as a service” operating models.
Margaret is a manager in the Capital Projects group of Deloitte Transactions and Business Analytics LLP’s Federal Practice. She has worked as a portfolio manager, project manager, purchasing agent, and superintendent on high-profile, complex construction projects in both the private and public sectors. Her experience includes construction dashboarding and analytics, building code research, claims analysis, facilities portfolio management, and cost analysis. Margaret graduated from Lehigh University with a BS in industrial engineering.
General session
Blockchain

Every industry is buzzing with the prospects of blockchain. Executives in all industries are wondering what it is, what it does, and how it will impact their business. Engineering and construction (E&C) companies are no different. In this session, we will engage in honest conversation, demystifying the true capabilities of this technology and debating relevant use cases. We will cover tax and business considerations of blockchain applications as well as the use of cryptocurrencies to the broader E&C ecosystem.

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Rob is the national co-leader of Deloitte’s E&C practice. He has more than 20 years of experience in tax consulting and concentrates on tax provisions, consolidated tax returns, corporate reorganizations, tax incentives, and accounting methods of large public multinational companies. Rob has spent his entire career working with large engineering, architecture, and construction firms, as a result, his tax technical background is focused on a wide range of industry-related projects, including design and build infrastructure contracts for federal, state, and international agencies; operation and maintenance contracts of government facilities; design, build, and operation of chemical weapon decommissioning sites; demolition contracts; remediation of contaminated land; and public-private partnerships. He has a bachelor’s degree in accounting from the University of San Diego and a master’s degree in taxation from San Diego State University.

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Kevin Shtofman serves as the national blockchain lead–US, in the Real Estate practice of Deloitte Consulting LLP. Kevin has more than 14 years combined experience in providing strategic, financial, accounting, business improvement, and technology services to owners, operators, developers, service providers, and asset managers in the real estate industry. Kevin has been working on blockchain, robotics, and cognitive automation initiatives for the past two years and has presented to audiences from coast to coast in 17 cities to date.