

## IN THIS ISSUE

Last chance!

[A/E Firm Financial Management](#) – March 7

[CEO / Senior Management breakfast](#) – March 14

NEW!

[Profitability & Risk Management in Engineering Practice](#) – April 4

WED  
March 7

Click [HERE](#) to register.

Click [HERE](#) to see who's  
already registered.

### SCHEDULE

7:30 A.M. – Check-in and breakfast

8:00 A.M. – Program begins

10:30 A.M. – Conclusion

### WHERE

David Evans and Associates, Inc.

2100 SW River Parkway

Portland, OR 97201



### SPEAKERS

- **Larry Van Dyke, CPA, Certified Global Management Accountant and CFO, Kittelson & Associates, Inc. (KAI)**
- **Lauren Poling, CPA, Financial and Risk Manager, Kittelson & Associates, Inc. (KAI)**

## [A/E Firm Financial Management](#)

Gain a high-level understanding of the principles of financial management at successful A/E firms, including how to:

- Drive strong firm-wide financial performance
- Focus on what really matters when reviewing financial statements
- Negotiate profitable projects
- Manage financially-successful projects
- BONUS: Best Practices to Ensure DOT Overhead Rate Approval

This 2½ hour session will be particularly helpful for engineers who are interested in pursuing a firm-wide leadership position down the road, or simply wanting to provide value-added business support to your clients and firm.

Good for 2.5 continuing professional development credits!

**WED  
March 14**

Click [HERE](#) to register.

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**SCHEDULE**

7:00 A.M. – Check-in and breakfast  
7:30 A.M. – Program begins  
8:30 A.M. – Conclusion

**WHERE**

Multnomah Athletic Club  
1849 SW Salmon Street  
Portland, OR 97205



**CEO / Senior Management breakfast**

This event for firm reps, CEOs, and other senior executives is a unique opportunity to meet and network with leaders of Oregon and southwest Washington engineering companies.

Join us for breakfast as ACEC Oregon board members discuss the 2018 legislative session.

Attendees are encouraged to share ideas for next steps to prepare for the 2019 session.

**THANK YOU TO OUR SPONSOR**



**WED  
April 4**

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Portland, OR 97201

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**Profitability & Risk Management in Engineering Practice**

Engineers often feel that they are between a rock and a hard place when it comes to risk management and profitability. If they follow all of the risk management advice they are given – e.g., “only sign 100% insurable contracts,” “don’t do business with difficult clients,” “send CYA letters about everything” – they risk losing clients and projects. But engineers are also aware that one claim can have devastating impact on the firm’s profitability in the form of a (often quite large) deductible obligation, lost time, damage to reputation, and the like.

In this seminar we will explore how engineers can navigate the dangerous waters between sound risk management and profitability. We will provide practical advice about client and project selection, contract negotiation, and using documentation and communication to strengthen client relationships and reduce the likelihood of professional liability claims.



**Karen is an active participant on the ACEC National Risk Management Committee and a frequent presenter at ACEC and AIA national meetings.**

**ABOUT THE SPEAKER**

**Karen Erger, Lockton**, is Vice President and Director of Practice Risk Management at Lockton, the world’s largest privately owned, independent insurance brokerage. Drawing upon her experience as a construction lawyer in private practice and as a claim supervisor for a major insurer of architects’ and engineers’ professional liability, Karen consults with Lockton’s architecture, engineering, and construction clients on practice management issues, including complex claims and contracts, and provides risk management training and resources.

She graduated Phi Beta Kappa from the University of Chicago at 20 years of age with a degree in politics, economics, rhetoric, and law, and earned her law degree at the University of Chicago Law School.

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## UPCOMING

- March 6 – ODOT presents, “Meet the Primes,” speed networking event, Salem
- April 15-18 – ACEC National Annual Convention & Legislative Summit, Washington, DC
- May 2 – Executive-level Mentoring / Panel Discussion

## SAVE THE DATES

- May 23 – Annual business dinner with *brief* committee reports
- June 20 – Networking Day golf tournament, Langdon Farms
- Sept 13-15 – ACEC OR+WA Fall Conference, Clearwater Casino Resort  
Suquamish, Washington *Right on the water!*

## ACEC Washington Upcoming Events – ACEC Oregon members receive the member rate!

- Mar 7 – Professional Ethics for Engineers
- Mar 8 – Developing Leaders Group Networking Happy Hour
- Mar 29 – Workshop: Principles of Project Management

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Comments? Questions? Please e-mail [mwebber@acecOregon.org](mailto:mwebber@acecOregon.org) or [adavis@acecOregon.org](mailto:adavis@acecOregon.org).

AMERICAN COUNCIL OF ENGINEERING COMPANIES OF OREGON

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**Upcoming events:** [http://www.acecoregon.org/calendar\\_list.asp](http://www.acecoregon.org/calendar_list.asp).

**ACEC Oregon is 115 member firms strong representing more than 3,500 employees!**

Check out our online directory at [http://www.acecoregon.org/AF\\_MemberDirectory.asp](http://www.acecoregon.org/AF_MemberDirectory.asp).



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