



2024 ACEC Ohio & ACEC Indiana Finance Forum

Jan. 9, 2024, from 11-1pm

Virtual via Zoom

11:00 - 11:20 Opening Topic lead by Scott Sutton of CBIZ Somerset (R&D amort AASHTO Audit Guide updates/FAR best practices)

11:20 - 11:45 Breakout Discussion Round 1

- Introductions and answer questions: How many people are in your firm, how many offices do you have and how big is your accounting department?
- Discuss how R&D amortization is impacting their firms (cash flow, succession issues, etc.)
- Overhead rate pain points and trends they are seeing from the DOTs (project audits, “unusual” requests, etc.)
- Internal control best practices and tips (anything that you’ve implemented that you want to share) and Secure Payments

11:45 - 11:55 Report outs from each group

11:55 - 12:15 Second Topic: Succession and Employee Retention Issues

12:15 - 12:40 Breakout Discussion Round 2

- Introductions and answer questions: What is one thing you wish you could add to your accounting department (software, personnel, etc) and one thing you which you could cut?
- Resource management best practices and how to implement resource management software
- Succession issues/ESOPS
- Employee retention issues (why are employees leaving/not happy?)
- Bonus structures (what has worked and what hasn’t).

12:40 - 12:50 Report outs from each group

12:50 - 1:00 Closing remarks, final questions/thoughts