

# HEDsUP

QUARTER ONE / 2025

IHED



## AGENDA

# 01

2024 Year in Review / 2025  
Look Ahead

- Finance
- Mktg/Sales
- Brand Realignment
- Operations

# 02

iFactor Overview

# 03

Strategic Planning

# 04

Project Showcase



HED





01

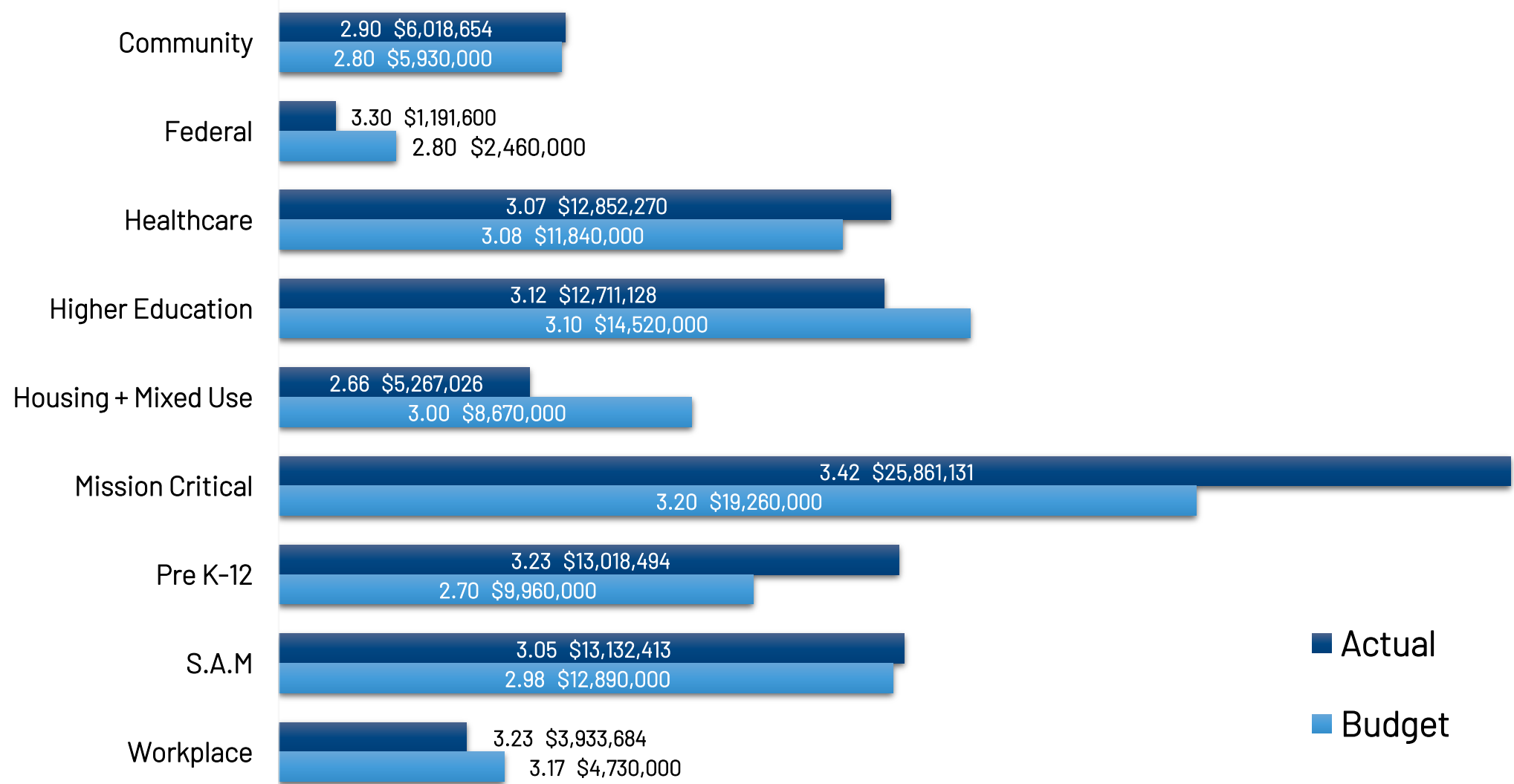
**2024 YEAR IN REVIEW /  
2025 LOOK AHEAD**

HED

	Actual	Plan	Prior Year
Net Revenue	\$94,003,000	\$90,260,000	\$81,892,000
Direct Labor Multiplier	3.15	3.02	2.97
Chargeability	56.7%	55.8%	54.8%
Net Payroll Multiplier	1.79	1.69	1.63
Profit Before Bonus & Tax	9.0%	7.5%	5.7%



## FINANCE / MARKET SECTOR 2024 BUDGET TO ACTUAL



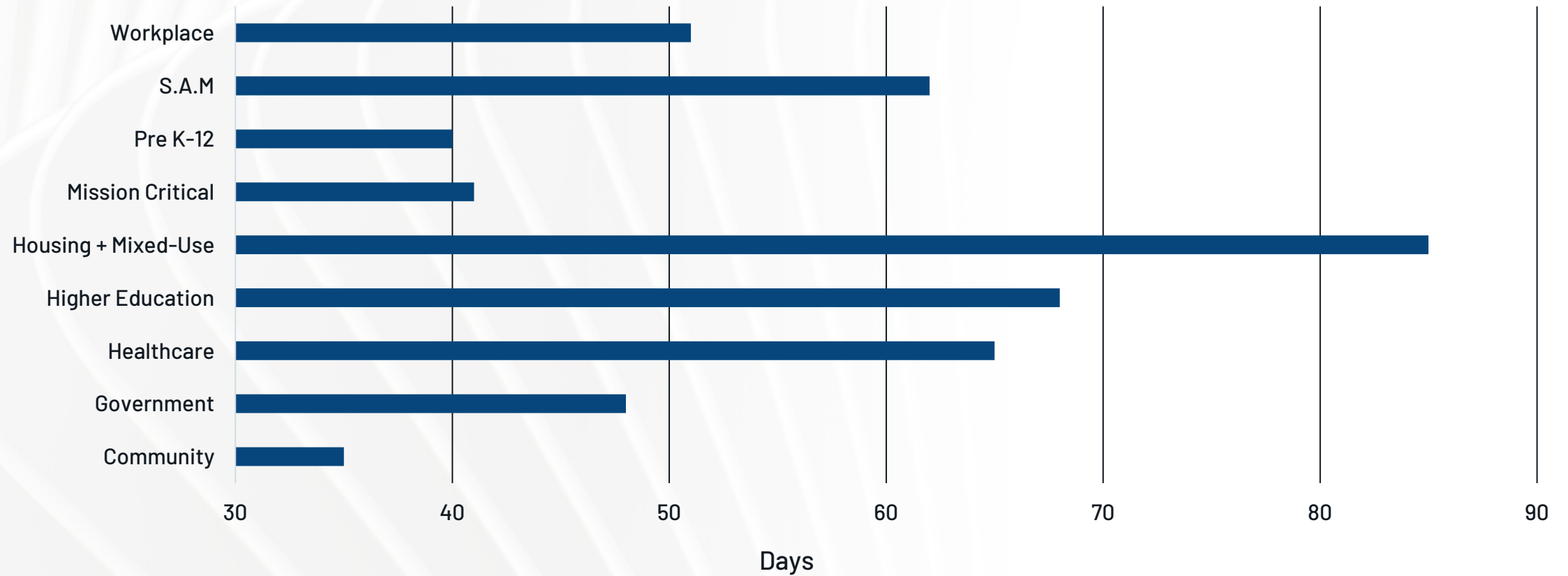


## FINANCE / MONTHLY MULTIPLIER - 2024





## FINANCE / AGED ACCOUNTS RECEIVABLE





- Switched Corporate Credit Cards allowing HED to earn cash back
- Changed Insurance Brokers with \$600k+ of Savings
- Project Manager training across the Firm
- Project Accountant training with Expanded Responsibilities
- New Reporting to Identify Project Planning Issues and Status of AR > 60 days
- Added Part-time Assistant Controller to Elevate the Department's skill set
- Implemented Harbor Compliance Software



- \$107.5M in Sales!
- 3 Sectors exceeded sales goals
- 798 New Projects Won, including:
  - LAUSD – \$8M
  - WVUM Berkeley >\$4M
  - Compass Data Centers >\$8.5M
- Brand Re-Alignment!
- Website Development Prep + Launch
- Diverse Partnerships Development
- Accounts – Net Promoter Score
- Marketing Budget – On Target
- CRM Improvements
- Strategy and Development – Team Growth

# FIRM SALES OVERVIEW / HOW ARE WE DOING?

\$107.49M

Actual Sales

\$112.10M

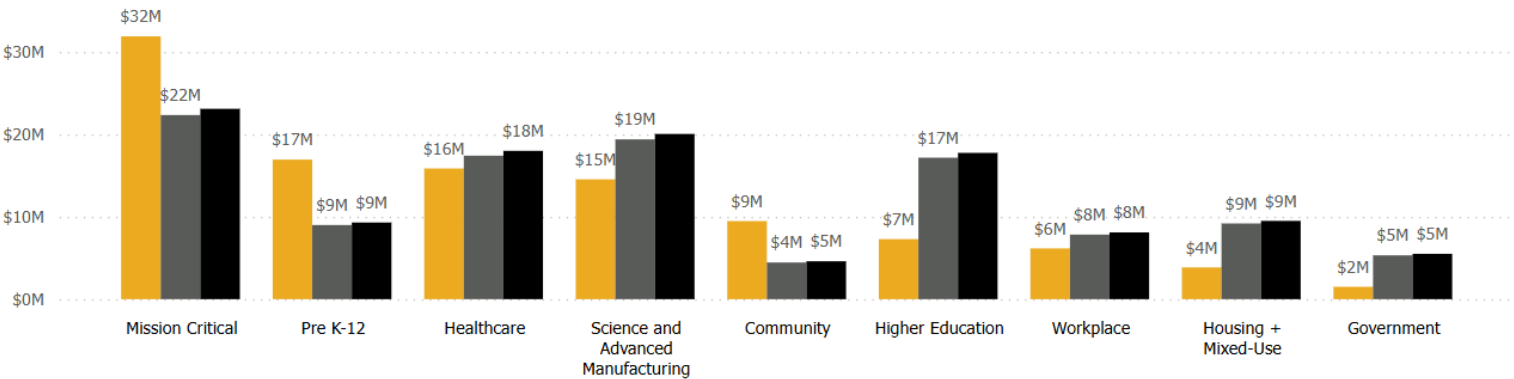
Prorated Sales Goal

\$115.90M

Annual Sales Goal

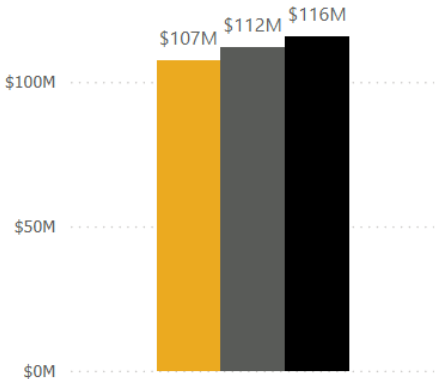
## Sales vs Goal

Actual Sales Prorated Sales Goal Annual Sales Goal



## Sales vs Goal - Firm

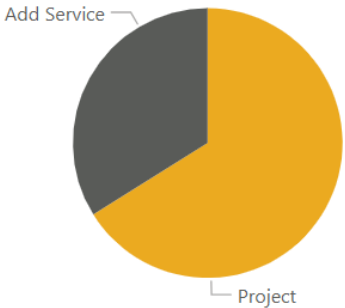
Net Fee Prorated Sales Goal Sales Goal



Project Number	Opportunity Name	Contract Name	Account Name	Esti
2023-NU010-003	NU NITMB Interior Renovation	Restroom Upgrades	Northwestern University	12/1
2023-CD006-012	PHX-I Bldg 6	AS01 - Liquid Cooling Mods	Compass Data Centers	12/1
2024-6C001-002	USST FL27 FL32 Spec Suites	BASE	601 W Companies	12/1
2023-WV002-011	WVUM Berkeley Medical Center Bed Tower	BASE	West Virginia University Health System	12/1
2024-HS023-001	Hanon - As Builts	BASE	Hanon Systems USA, LLC	12/1
2024-SF012-006	SFUSD PA & Clock Upgrades - 12 EED Campuses	BASE	San Francisco Unified School District	12/1
2024-UO088-002	UIH OCC CMRR MRI Suite Renovation	DSR 001 Programming	University of Illinois at Chicago	12/1
2024-UO088-006	UIH Room 860 Bathroom & Office Renovation	BASE	University of Illinois at Chicago	12/1
2024-CO024-001	Phila Crime Lab Predesign	BASE	City of Philadelphia	12/1
2024-DR011-027	IAH10 3MW Data Center Concept Study	BASE	Digital Realty Trust	12/1
2024-DR011-010	IAD52 Brickyard B Shell PBB	CO-01 TES, Piping and Conduit Revisions	Digital Realty Trust	12/1

Total

## Add Service vs Projects





- Hired/Onboarded 72 Hires
- Completed Workplace Violence Prevention Training in CA
- Engaged Pearl Meyer for Compensation Benchmarking
- Modifications to Onboarding Process
- Addition of Verbum Dei Interns in Dallas
- Established & Launched JEDI Pillar Groups
- Activity with Rewards & Recognition Program
- Best & Brightest Places to Work Awards

- Reviewed and Improved Contract Language for Numerous Contracts
- Maintained Registrations for Compliance
- Updated/Improved HED Standard Agreements
- Provided Counsel and Guidance to Mitigate Potential Claims:
  - West Dallas ISD
  - Wacker
  - OUSD- El Modena
- Helped Move Several Matters to or Closer to Resolution (BSH Monterrey, CDB Veteran's Homes, Heywood)



- Onboarded/Integrated Denver Office
- Improved Wireless Systems in Multiple Offices
- New Conferencing Capabilities for Bos & Sac
- Enhanced Security Posture
- Added Functionality to CRM
- Migrated Folders System to Egnyte
- Added Embodied Carbon & BI Reporting to Building Performance Interface
- Built Initial Fee Build Up Tool and Framework for Planning System

- Supported the Creation of 646 Revit Files/263 Projects-Savings 6,460hrs
- Provided PT Symposium for Denver
- Delivered 3 Tech Talks
- Published 22 Articles through PT User Digest
- Published Update for Project Create that Includes Customization Options for Sectors
- 5 Updates to HED SEED
- Published 65 Science/Lab Details
- Developed/Released Mechanical Smart Schedules
- 4 Staff Presented at Industry Events



- Re-aligned Initiatives with HED's Strategic Plan
- Formed/trained a 6-member Team for Performing Cal Green Required LCA's
- Completed Assessment of Firm's 2023 Carbon Footprint and Procured Portfolio of Carbon Offsets
- Partnered with IT to Add Embodied Carbon Fields to our 2030 Interface in CRM
- Began Integrated Design Excellence Workshop training
- Supported a dozen of active or new LEED certifications

- Identified Sector Needs for Efficiencies in Early Design
- Established Support Team Members to Streamline Early Design Phase
- Provide a Unified Set of Tools, Plugins & Libraries
- Formed Strategic Group of High Technical Performers from Each Office
  - Make Recommendations to DL's and Ops to Improve Standards to Align with Modern Practice
- Creation of Standards for Test Fits
- Creation of Automated Finish Plans
- Creation of LEAN Workflows
- Institute 15 Minute Team Check-ins
- Developed BI Tools to Visualize Performance



**BELIEVE YOU CAN  
AND YOU'RE  
HALFWAY THERE.  
- THEODORE ROOSEVELT**

- Market Strategy and Growth - \$143M Goal
- Integrated Practice Development/Value Proposition
- Integrated Scope of Service Standards
  - Structural
  - MEP
  - ICT
  - Landscape Architecture
  - Lab Planning
- Marketing Collateral – Integrated Services
- Website Development – Q3-Q4 Launch
- Brand Development Evolution
- iFactor Integration with our Sectors
- Bundling Strategy
- Client Intimacy Program

	2025	2024	2023
Net Revenue	\$110,320,000	\$94,003,000	\$ 81,892,000
Direct Labor Multiplier	3.17	3.15	2.97
Chargeability	57.1%	56.7%	54.8%
Net Payroll Multiplier	1.81	1.79	1.63
Profit before Bonus & Tax	13.75%	9.0%	5.7%



- Efficiency – Focus on use of existing Tools and Processes
- Quality – Follow QA Process using REVIZTO
- Staff – Consistency & Retention



02

## IFACTOR OVERVIEW



## OVERVIEW

At the start of the year, we announced the completion of negotiations for a merger with Infrastructure Factor Consulting, Inc. (iFactor). This partnership between HED and iFactor opens doors to enhanced growth and collaboration opportunities across Mission Critical, Healthcare, Workplace, and Entertainment sectors.





## WHY MERGE?

- Professional development and growth opportunities for talent
- Synergistic firm cultures, kind culture
- More powerful combined national engineering practice
- Talent retention and recruitment
- Strengthens market presence for Mission Critical, Healthcare, Workplace, Entertainment
- Access to deeper resources, processes, and tools

## IFACTOR AT A GLANCE

- MEP Engineering
- Controls Design
- Sustainable Design
- Commissioning
- Master Planning



WOMEN OWNED BUSINESS  
(WBE)



CERTIFIED COMMISSIONING FIRM



RELATIONSHIP AND SERVICE  
DRIVEN



3 OFFICES IN EL SEGUNDO,  
ORANGE, AND TAMPA



18+ YEARS IN BUSINESS



90% CLIENT RETENTION RATE



FOCUS ON HIGHLY TECHNICAL  
PROJECTS



LABJ BPTW 12 YEARS IN A ROW



# 03

## STRATEGIC PLANNING



TARGET DATE:  
**2024**  
Q1 SNAPSHOT

# focus one advance our people

Champion: Petrina Gooch

## goal one

Understand  
Your Role

- 1.1 Role Clarity
- 1.2 Culture of Accountability
- 1.3 Support Integrated Practice

## goal two

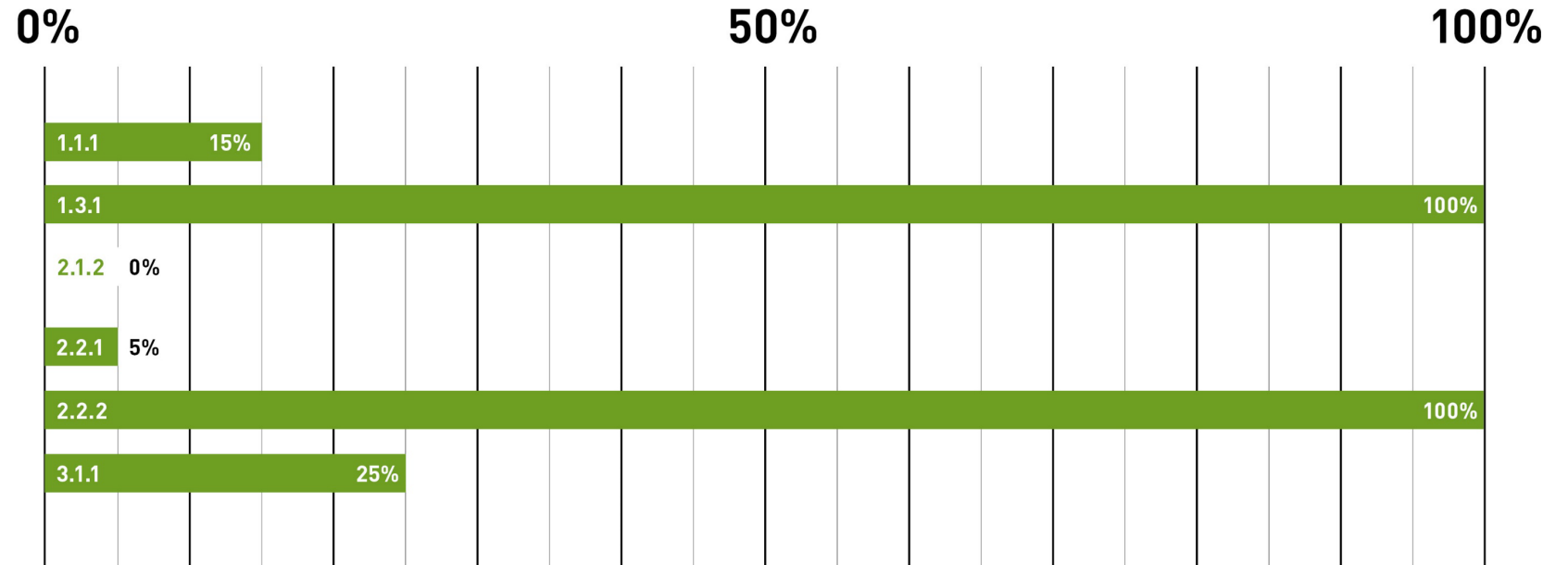
Live Your Role

- 2.1 Support High Performance
- 2.2 Empower People to Excel

## goal three

Become a  
Better You

- 3.1 Implement review and development process
- 3.2 Succession Planning



1.1.1 Role descriptions and expectations (Gooch)  
1.1.2 Annual review of role descriptions process (Gooch)  
1.2.1 Create a training curriculum (Vogelheim)  
1.3.1 ID opportunities for engineering leadership roles (Cooper)  
1.3.2 Implement consistent recruiting/hiring strategies to right size staff make-up (MacDougall)  
1.3.3 New hire orientations (Van Herle)  
2.1.1 Re-evaluate recognitions program towards quality (Van Leer)

2.1.2 Implement an incentive and awards program for project performance (Aluwi)  
2.2.1 Change management plan for future HED (Suarez)  
2.2.2 Core values collateral and communications (Suarez)  
2.2.3 Establish a phased-in mentorship program (Gooch)  
3.1.1 Create road map for review process Gooch)  
3.1.2 Implement phase two of HED performance reviews (Gooch)

3.1.3 Complete professional development and complete employee review process (Gooch)  
3.2.1 Develop a succession planning process (Van Herle)  
3.2.2.1 Create a leadership training program (Gooch)  
3.2.2.2 Implement leadership training programs (Gooch)  
3.2.3 Develop a process for "real-time" updates of staff skill sets (O'Keefe)

TARGET DATE:  
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Q1 SNAPSHOT

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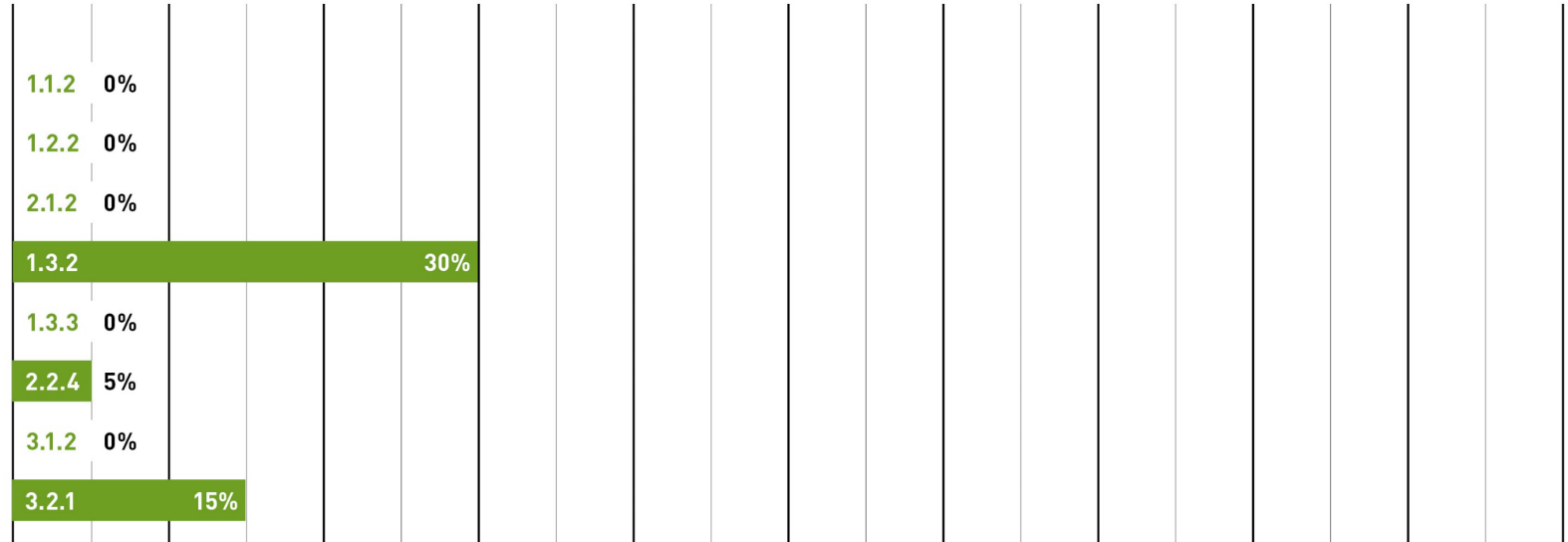
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0%

50%

100%



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HED

TARGET DATE:  
**2024**  
Q1 SNAPSHOT

# focus two advance integrated practice

Champion: Tania Van Herle

0% 50% 100%

## goal one

Transformation from  
Multi-Disciplinary to  
Integrated

- 1.1 Redefine the project team concept
- 1.2 Tailor project execution to support integrated processes
- 1.3 Share staff expertise and capabilities

1.1.1 40%

2.3.2 100%

## goal two

Re-Envision  
Project Delivery

- 2.1 Front-load design process to achieve greater efficiency
- 2.2 Leverage data to improve quality
- 2.3 Prepare for Deliverables of the Future

3.1.2 95%

3.2.1 40%

3.2.3 95%

## goal three

Positive Climate  
Impact

- 3.1 Achieve 100% Net zero by 2030
- 3.2 Identify incremental milestones to net zero carbon by 2050

4.1.2 35%

4.2.1 95%

## goal four

Become a recognized  
leader in Digital Design

- 4.1 Drive a culture of curiosity towards new technologies
- 4.2 Apply AI as a complement to our workflow
- 4.3 Automate the Design Process

1.1.1 Define and educate staff on the optimal integrated team (Spenburgh)  
1.1.2 Balance project leadership for greater representation of engineering - grow to 20% by 2026 (Van Herle)  
1.2.1 Review and update design process 2.0 for integrated practice - priority two (MacDougall)  
1.2.2 Reinforce process alignment for cross-discipline communication improvements (Cooper)  
1.2.3 Showcase projects that represent integrated practice delivery (Van Herle)  
1.3.1 Create a "heat map" of staff expertise and skill sets (Gooch)  
1.3.2 Develop a process for "real time" updates of staff skill sets (O'Keefe)  
2.1.1 Create a two-phase design process as standard delivery (MacDougall)  
2.1.2 Adapt our fees to front- and back-load projects to reflect new design processes (Van Herle)

2.2.1 Capture, analyze and share data for permitting and CA phases (Rostar)  
2.3.1 Leverage 3D models to aid in the construction process (Staging, etc) (Rostar)  
2.3.2 Maximize use of schedules for project delivery (Isaku)  
2.3.3 Define and deliver a digital twin for all projects over \$50M. (Rostar)  
2.3.4 Expand the use of LEAN in project delivery (Schnizler)  
3.1.1 Create energy models for all projects - phase-in each year 2024-2026 (Klug)  
3.1.2 Transition to 100% adoption of IES (Pesta)  
3.1.3 Set annual goals for net-zero projects by sector (La Quire)  
3.2.1 Redefine spec standards for zero-carbon (Jaconetti)  
3.2.2 Set aside R&D budget of \$30k to allow testing of carbon neutral tech (Crook)  
3.2.3 Partner w/marketing for internal training (Golovko)  
4.1.1 Effect a cultural shift to tech acumen in leadership (Van Herle)

4.1.2 Invest in emerging technologies effect a cultural shift to tech acumen in leadership (Van Herle)  
4.2.1 Embrace the testing of AI platforms (Rostar)  
4.2.2 Identify operational and sector problems where AI can be used (Vogelheim)  
4.2.3 Complete two projects with significant use of AI solutions (Willsmore)  
4.3.1 Identify at least one area ideal for automation in each sector (Georgeglou)  
4.3.2 Identify five high-value automations (Rostar)  
5.1.1 Drive data collection culture (Paloutzian). Note: Phase-in into 2025 and 2026  
5.1.2 Hire a knowledge manager (Van Herle)  
5.1.3 Establish a data strategy/data map (Knowledge Manager)  
5.1.4 Drive data analysis culture to inform project decision-making and workflow (Knowledge Manager)

## goal five

Harness Data and  
Internal Knowledge  
for More Efficient and  
Qualitative Project  
Delivery

- 5.1 Develop a Knowledge Management System

HED



TARGET DATE:  
**2025**  
Q1 SNAPSHOT

# focus two

## advance integrated practice

Champion: Tania Van Herle

0%

50%

100%

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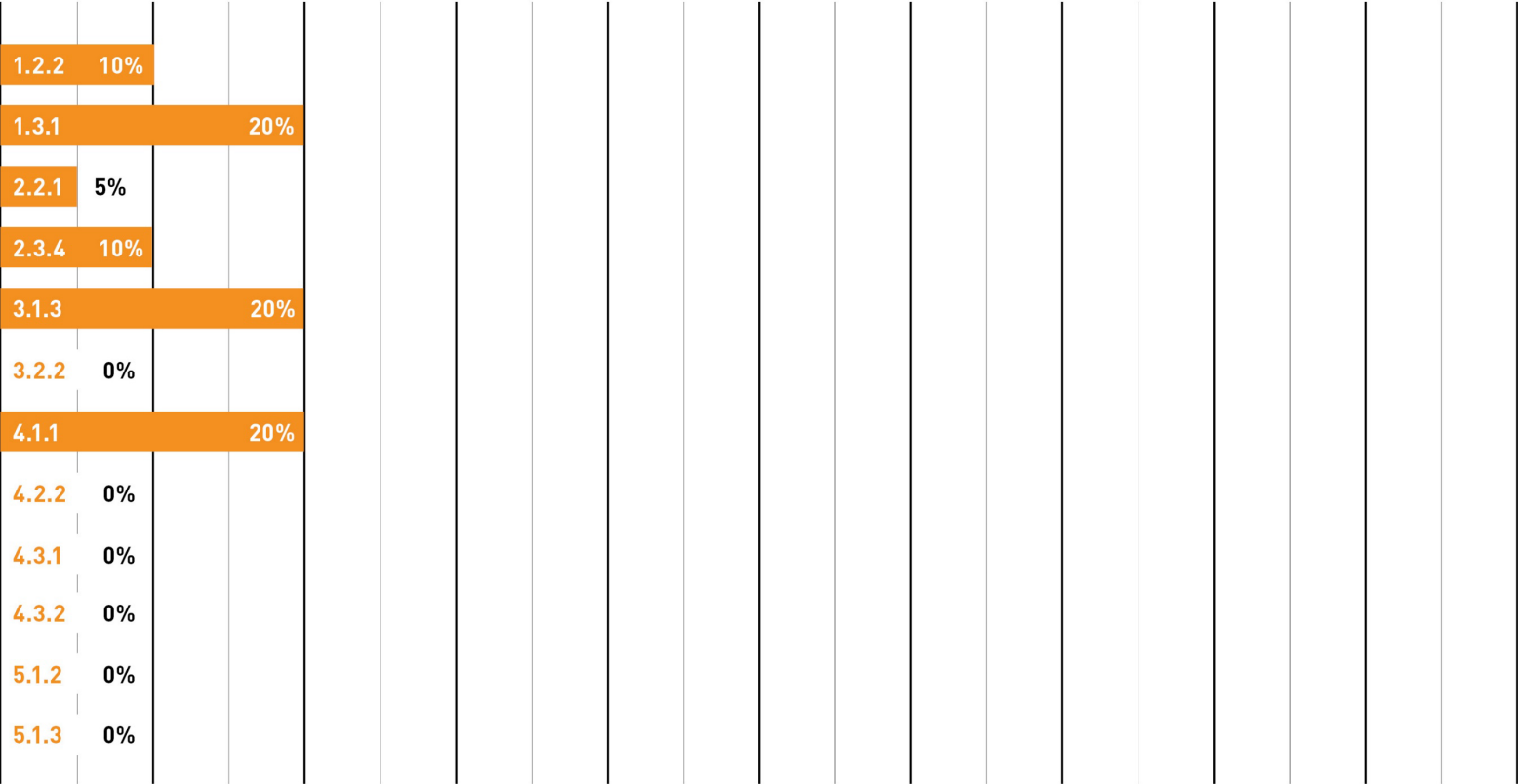
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HED

TARGET DATE:  
**2024**  
Q1 SNAPSHOT

# focus three

## advance our business performance

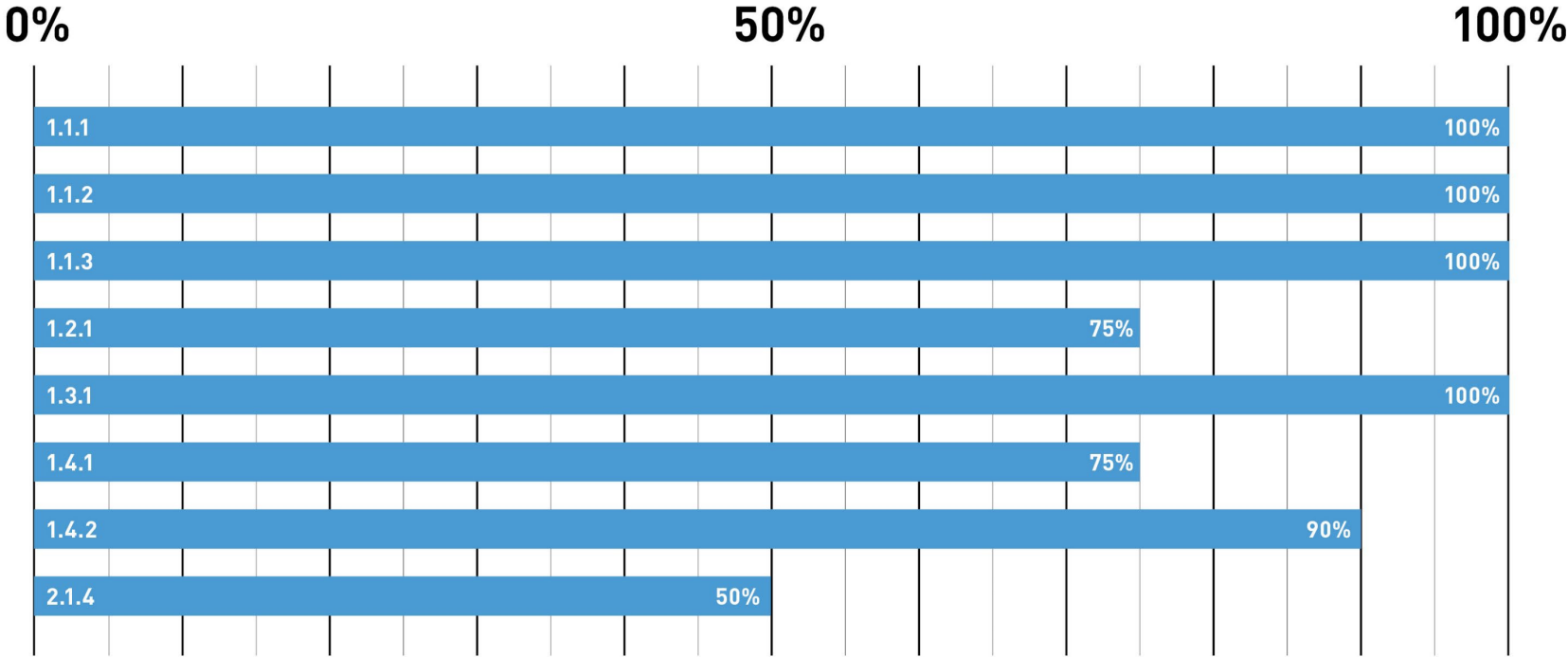
Champion: Angie Janssen

**goal one**  
Increase Firm Profitability to 20% of Net Revenue. 2024-7.5%; 2025-13.75%; 2026-20%

**goal two**  
Grow to \$150M+ in Net Revenue within 3 years

- 1.1 Establish a Culture of Accountability for project planning and execution
- 1.2 Educate PIC's and PM's
- 1.3 Create a "Smart" work culture focused on high quality results executed efficiently
- 1.4 Eliminate A/R over 90 Days

- 2.1 M&A Establish strategies to focus on value and differentiation consistent with the Vision of the HED as an integrated practice
- 2.2 Increase Integrated Service revenues to 35% by Yr 3
- 2.3 Establish an organic growth strategy in key sectors



1.1.1 Monitor quality of project planning with PIPs (MacDougall);  
1.1.2 Revamp project review process (MacDougall); Weekly trend report reviews (Janssen)  
1.1.3 Weekly review of project trend report to identify projects (over HED net fee of \$200k) that are declining in performance with required reset meeting if profit has declined by 1%. Champion: (Janssen)  
1.2.1 Conduct system of yearly - quarterly financial, risk management, legal, and general business issues (Van Herle)  
1.2.2 Conduct lessons learned review meetings for all projects - enter into knowledge management (Yu-Ming Wei)  
1.3.1 Revise board policy on incentive compensation (Van Herle)  
1.3.2 Celebrate teams/team members who achieve high quality results (Whitebone)

1.3.3 Deploy offshore resources on 5% of net revenue by 2025 (Van Herle)  
1.4.1 Require PIC/PMs to follow A/R collections protocols (Fowler)  
1.4.2 Develop written add-services and stop-work policy when A/R not paid (Wingelaar)  
2.1.1 Identify merger opportunities with firms that enhance alternative delivery (Devereaux)  
2.1.2 Identify merger opportunities that expands engineering (Devereaux)  
2.1.3 Geographic expansion targeting Mid-Atlantic, Southeast, and Northwest (Devereaux)  
2.1.4 Develop a report card to measure success of M&A transactions (Van Herle)

2.2.1 Establish year-over-year expansion for business plans with each sector: Structural, MEP, EGD, Landscape, Lab Planning, Design-Arch, Interior Architecture (Suarez)  
2.3.1 In business plans - identify SMEs to promote depth and growth of the sector. (Drake)  
2.3.2 Increase production capacity by establishing "critical mass" strategy: Dallas, Denver, Boston, Chicago (MacDougall)

TARGET DATE:  
**2025**  
Q1 SNAPSHOT

# focus three

## advance our business performance

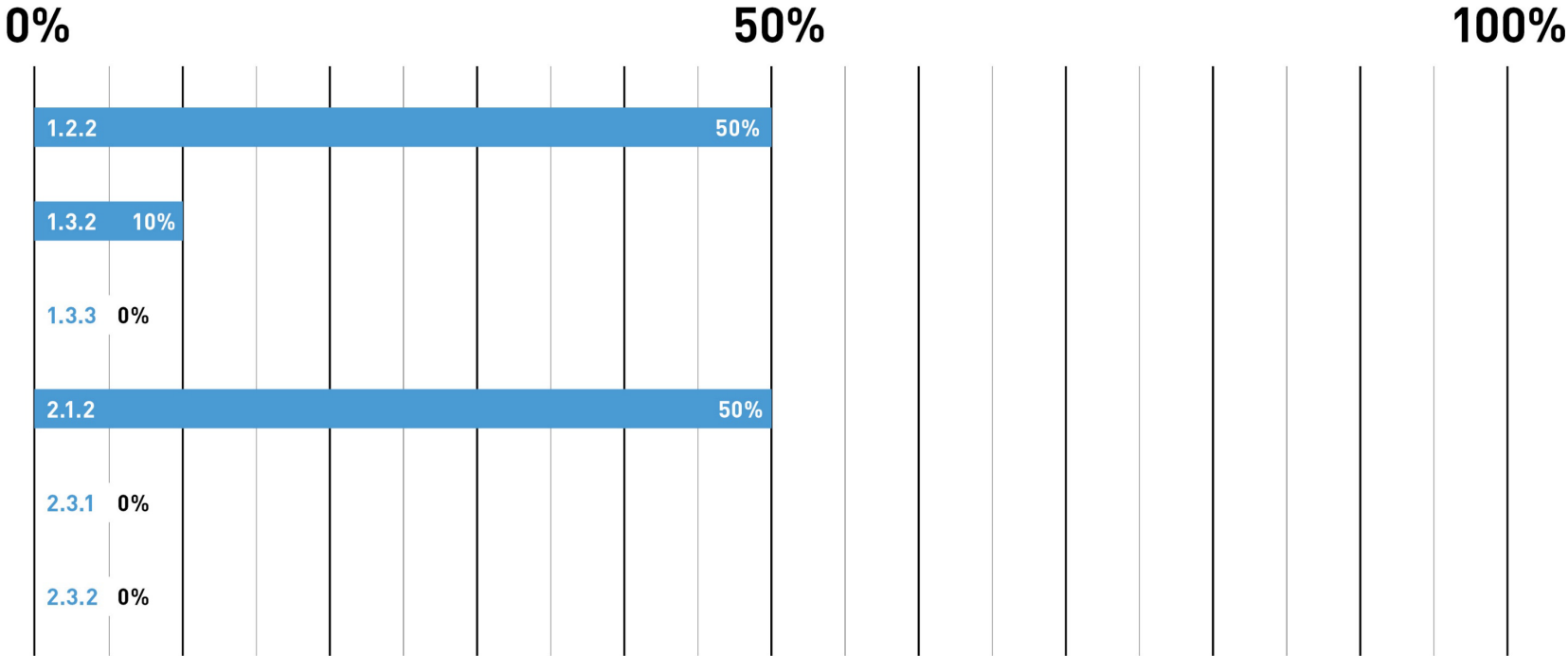
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Q1 SNAPSHOT

# focus four

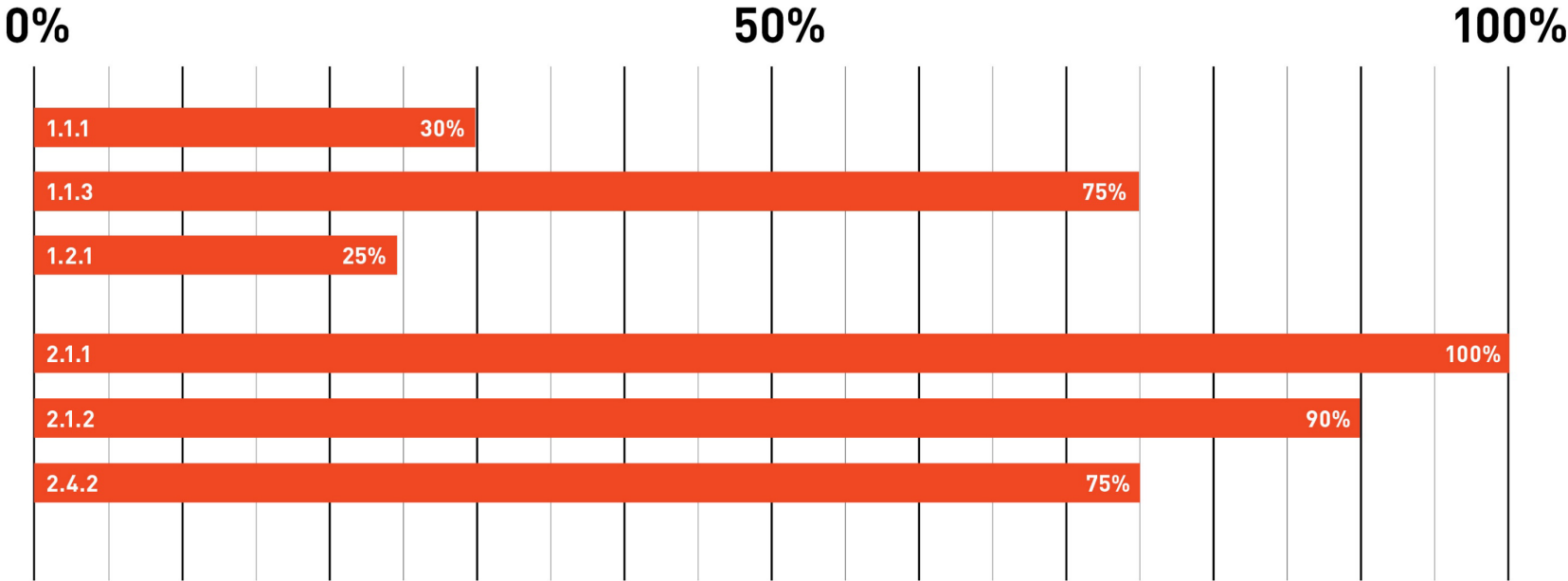
## advance our brand

Champion: Enrique Suarez

**goal one**  
Be recognized as national experts in Mission Critical, Healthcare, Higher Education, Workplace

**goal two**  
Define and promote the vision of HED as an integrated firm

- 1.1 Resource Reallocation; Align Budgeting Process
- 1.2 Gain National recognition and awards
- 1.3 Build account-based longterm relationships with target clients
- 2.1 Develop distinct HED Differentiators, establish HED brand DNA/Personality
- 2.2 Increase measurable national awareness of HED
- 2.3 Develop the HED bundling model
- 2.4 Develop the HED Story of Integrated Design, Value Proposition



1.1.1.1 Establish a process to enable research on national trends to ID investments (Suarez).  
1.1.1.2 Solidify sector goals, and implement needed investments, strategic hires. Year over year re-allocate marketing spend (Suarez)  
1.1.2 Implement BD strategies in the national sectors that identifies and targets national high-value clients (Miller)  
1.1.3 Establish a consistent process for content curation, thought leadership, etc for external engagement (Thiede)  
1.2.1 Prioritize, Identify awards and recognitions (Gaines)  
1.2.2 Implement the initiative to meet the requirements for awards and recognitions. Establish an awards team, approach, pre-positioning (Kaland)  
1.2.3 Associate HED expertise with industry partners and allied research experts for research initiatives (Odell)  
1.3.1.1 Build a client intimacy program (Suarez)  
1.3.1.2 Implement HED client feedback process (Suarez)  
1.3.1.3 Consistently measure client feedback for top 20% of sector projects with measurables (Suarez)

1.3.2 Complete post occupancy reviews for 50% of all projects (Drouillard)  
2.1.1 Establish the HED differentiators and value proposition for external use (Suarez)  
2.1.2 Focus a re-brand to encapsulate relevancy to national targets, collateral and website (Thiede)  
2.1.3 Showcase HED as a kind culture, evolve and mature the message into year three (Simcik)  
2.1.4 Develop new website (Suarez)  
2.2.1 Re-assess PR Strategies (Thiede)  
2.2.2 Implement consistent approaches to promote people, projects, processes, and transformative technologies establish measurables (Thiede)  
2.2.3 Implement new brand material and collateral, ID core presentation teams, presentation training, etc (Thiede)  
2.3.1.1 Implement a plan to promote and establish a bundling approach to HED services (Suarez)

2.3.1.2 Implement offering bundled services at a higher value than stand-alone (Suarez)  
2.3.1.3 Develop examples and promote leading services by any discipline (Suarez)  
2.4.1 Increase external and internal market awareness (Suarez)  
2.4.2 Develop marketing materials, collateral, and thought leadership to support integrated practice; and publish practice content (Thiede)



TARGET DATE:  
**2025**  
Q1 SNAPSHOT

# focus four

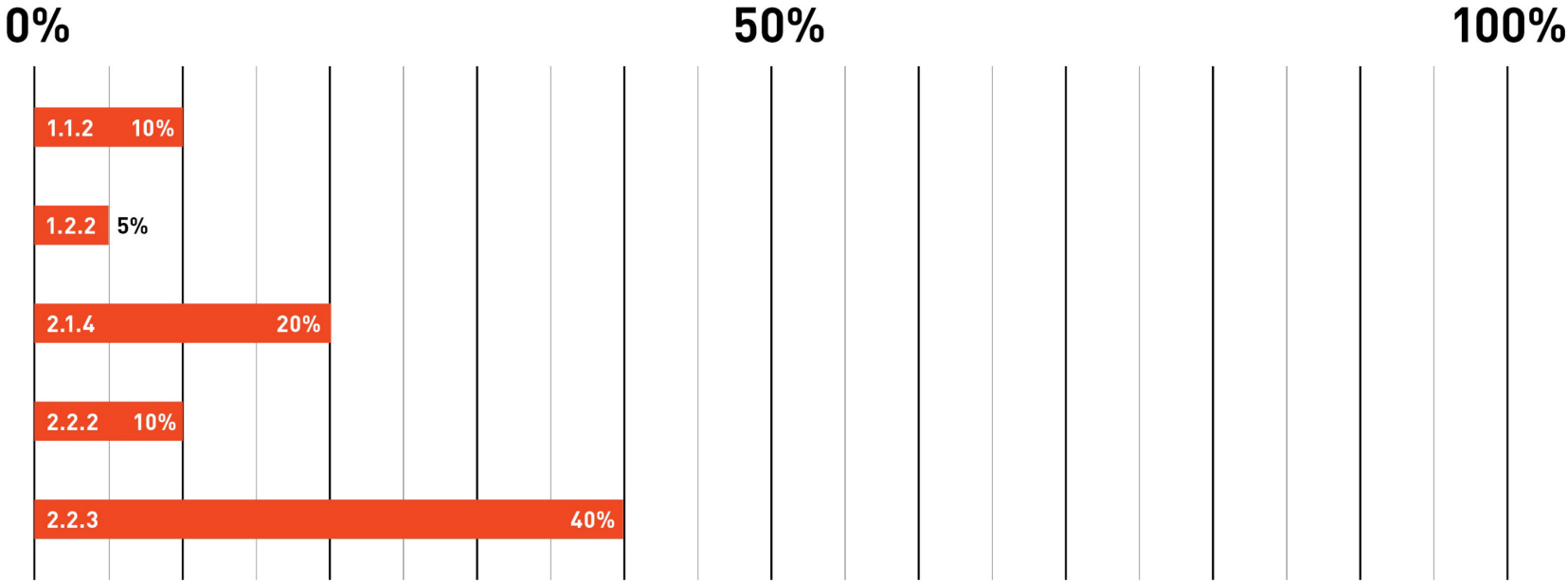
## advance our brand

Champion: Enrique Suarez

**goal one**  
Be recognized as national experts in Mission Critical, Healthcare, Higher Education, Workplace

**goal two**  
Define and promote the vision of HED as an integrated firm

- 1.1 Resource Reallocation; Align Budgeting Process
- 1.2 Gain National recognition and awards
- 1.3 Build account-based longterm relationships with target clients
- 2.1 Develop distinct HED Differentiators, establish HED brand DNA/Personality
- 2.2 Increase measurable national awareness of HED
- 2.3 Develop the HED bundling model
- 2.4 Develop the HED Story of Integrated Design, Value Proposition



1.1.1.1 Establish a process to enable research on national trends to ID investments (Suarez).  
1.1.1.2 Solidify sector goals, and implement needed investments, strategic hires. Year over year re-allocate marketing spend (Suarez)  
1.1.2 Implement BD strategies in the national sectors that identifies and targets national high-value clients (Miller)  
1.1.3 Establish a consistent process for content curation, thought leadership, etc for external engagement (Thiede)  
1.2.1 Prioritize, Identify awards and recognitions (Gaines)  
1.2.2 Implement the initiative to meet the requirements for awards and recognitions. Establish an awards team, approach, pre-positioning (Kaland)  
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# 04 PROJECT SHOWCASE

IHED

















HED





# THATCHER YARD

3311 S. THATCHER AVE

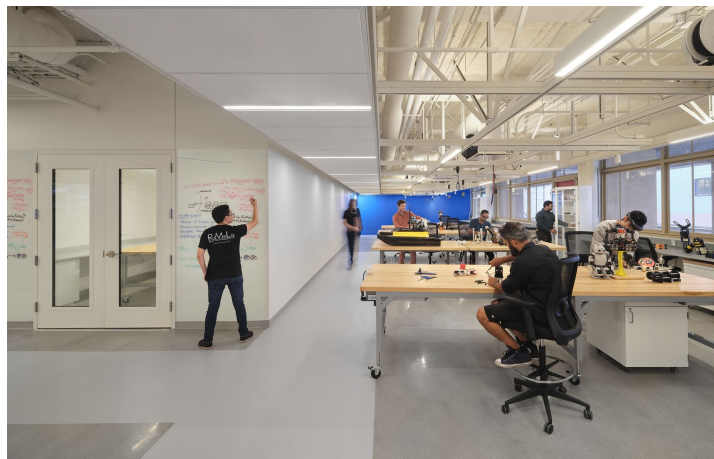












HED

































HED













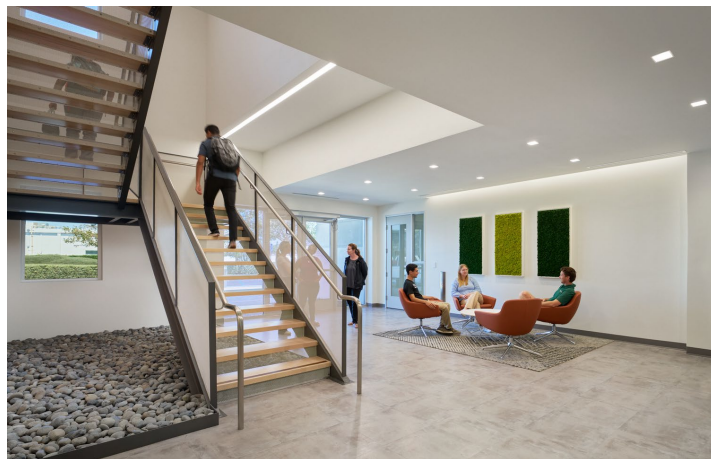












HED































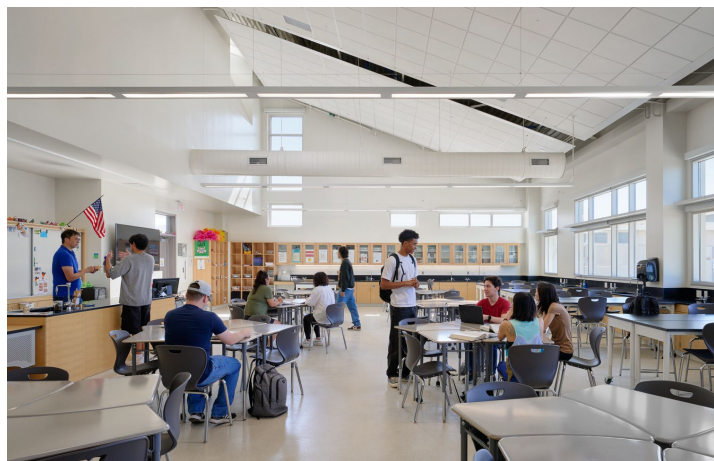


HED



















# **BREAKOUT ROOMS**

IHED