

# Small Firm Forum for Canada's Consulting Engineering Sector 2025



Nov 09 - 11, 2025 - Chateau Vaudreuil



# Forum Agenda

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## **Arrival Day                      Sunday, November 9, 2025**

**4:00 p.m. +                      Afternoon Arrival & Check-In**

**7:00 p.m.  
Restaurant Villa Elina                      Welcome Reception & Dinner**

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## **Day 1                                      Monday, November 10, 2025**

**7:30 a.m.  
Restaurant Villa Elina                      Breakfast**

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**Session 1                                      Opening Participant Introductions & Top Challenges/  
8:40 a.m.                                      Opportunities  
St-Lazare/Hudson**

**Discussion Leaders:                      John Gamble–ACEC Canada & Bill Robertson-Forum Director**

In this opening session, we will tap into what we, as Consulting Engineering leaders, see as our top challenges and/or opportunities at our own organizations during these roundtable self-introductions.

This will be an extraordinary opportunity for participants to both share and hear about the most pressing issues being faced by our peers and will act as a touchpoint as the discussions continue throughout the Forum, with the goal of finding a path to solutions through shared experiences.

**Discussion Leaders: Doug Coles, Coles Associates**

In this era of economic uncertainty, small and mid-sized consulting engineering firms are facing unique challenges in forecasting growth and positioning themselves for long-term success. This session will explore how these leaders are navigating unpredictable market conditions while identifying and pursuing opportunities for diversification. Whether expanding geographically into the US or overseas; shifting focus from private sector to public sector work; or building resilience against policy and regulatory changes. Forum participants are expected to share and learn from real-world experiences, lessons learned, and forward-looking strategies.

The discussion is also expected to explore emerging market trends, workforce challenges—such as the impact of Canadian visa freezes on engineering talent pipelines—and innovative approaches to integrating high-value centres, including leveraging global talent in non-traditional ways. We will also address the evolving role of EDI and social policy requirements in procurement processes, all with the purpose of fresh perspectives, actionable insights, and a deeper understanding of how this industry is planning for growth in the face of uncertainty.

**Discussion points:**

- How are you currently forecasting growth given today's economic volatility, and what metrics or indicators do you rely on most?
- What market trends—both domestic and international—are shaping your strategic planning for the next 3–5 years?
- Success stories or cautionary tales from geographic diversification (US, overseas); should the US be regarded differently; to shifting the product mix between private and government work.
- Strategies for mitigating the impact of workforce shortages due to policy-driven constraints such as engineering student visa freezes.
- Innovative models for “high value centres” — integrating international talent (e.g., in India) directly into firm operations or project delivery.
- The influence (or absence) of EDI and social policy criteria in procurement—does this alter your approach to proposals and partnerships?
- Practical steps for fostering a leadership culture that can adapt quickly to emerging risks and opportunities.

**10:30 a.m.**

**Refreshments**

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**Session 3**

**10:45 a.m.**

**St-Lazare/Hudson**

**A Broader Discussion About KPIs – Finding the Metrics That Matter for Small Firms**

**Discussion Leader: Sheldon Hudson, AI-Terra Engineering Ltd.**

Key performance indicators can be a valuable way to measure and manage a firm's performance, but for many small firms, deciding what to track (or whether to track anything at all) can be a challenge. Some firms have a well-developed KPI framework, while others are just starting to experiment, and some may not use KPIs at all.

This session will be an open discussion to explore:

- The top KPIs that firms are tracking and whether there is a stronger focus on leading or lagging indicators.
- The KPIs that have helped (or not) in guiding decisions and improving performance.
- Experiences with balancing different KPIs, particularly between financial, operational, and human capital metrics.
- Where firms get baseline KPI data to measure themselves against.
- How firms collect and analyze their data to produce meaningful KPI information.

Questions to Consider:

- Does your company track KPIs, and if so, which KPIs are most valuable? Which KPIs have your team abandoned?
  - If your company does not currently track KPIs, what has influenced that decision?
  - How have your KPIs changed as your firm has grown, or as your markets have shifted?
  - What has worked well in making KPIs meaningful for your team?
  - Have you found certain metrics to be misleading or counterproductive?
  - Does your company use an Enterprise Resource Planning (ERP) solution to track and report KPIs? What challenges have you found in producing good data?
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**12:00 p.m.**

**Restaurant Villa Elina**

**Luncheon**

**Session 4**  
**1:00 p.m.**  
**St-Lazare/Hudson**

**Risk & Insurance Management for Small Consulting  
Engineering Firms – Including Contracts & Sub-Contracts**

**Discussion Leaders: Simon Davidson, Carbonic Dime-eX**

Small consulting firms face a unique set of challenges when it comes to managing risk—especially as they grow and take on more complex projects, clients, and sub-contractors. This session will focus on practical strategies for small firms, addressing the most pressing issues in insurance coverage, contract negotiation and risk mitigation. A panel of experienced business owners will share insights and lessons learned from real-world scenarios, helping attendees understand how to protect their businesses while remaining agile and competitive. Shared experiences and best practices are essential!

Participants will leave with a clearer understanding of how to structure contracts, manage sub-contractor relationships, and navigate insurance requirements tailored to the scale and scope of their operations.

**Key Discussion Points:**

- Common insurance policies for consulting firms: professional liability, general liability, cyber insurance, and directors & officers (D&O)
- Price variation in the market
- Contract clauses that reduce exposure: indemnity, limitation of liability, termination, and dispute resolution
- Managing risk in sub-contractor relationships: vetting, insurance requirements, and flow-down clauses
- Balancing risk and opportunity in client negotiations
- How to scale risk management practices as your firm grows
- Working with brokers and legal advisors: what small firms should expect and ask for. what is our real negotiation power when it is forced by professional order
- Real-world examples of claims, disputes, and lessons learned
- Emerging Risks and Technology Dependence (AI use, Software terms, and conditions, etc.)
- M&A considerations.

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**2:15 p.m.**

**Refreshments**

**Session 5**  
**2:45 p.m.**  
**St-Lazare/Hudson**

## **AI – The Impact & Opportunities for Small Consulting Engineering Firms**

**Discussion Leaders:**      **Glen Sibbeston, Trapline Engineering Ltd.**

AI is quickly moving from buzzword to practical tool, and even small consulting firms are starting to test its potential. From drafting reports to checking calculations, AI could take on time-consuming tasks and free up time for higher-value work. But it also raises tough questions: How do we ensure accuracy when engineers remain ultimately responsible for what is issued? How do we bring junior staff along when some of the grunt work that builds judgment and experience may be short-circuited?

This session will look at real-world opportunities and pitfalls for AI in small firms. The goal is to share what people are trying, what is working, what's risky, and what systems or safeguards firms should consider as the tools become more capable.

### **Discussion Points:**

- Where are firms finding quick wins from AI (design, drafting, project planning, admin)?
- What barriers exist for small firms (cost, training, client acceptance, cultural buy in)?
- Engineers remain responsible for issuances: what checks, approvals, or QA/QC mechanisms are needed when AI is involved?
- How could AI change junior staff development—does it shortcut key experiences that build engineering judgment?
- How might AI shift client expectations, procurement processes, or competition among firms?
- Looking forward: how can small firms balance experimentation with responsible, sustainable adoption?

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**4:00 p.m.**

## **End of Day 1 - Forum Sessions**

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**7:00 p.m.**  
**Restaurant Villa Elina**

## **Reception and Dinner**



## Day 2

**Tuesday, November 11, 2025**

**7:30 a.m.**

**Breakfast**

**Restaurant Villa Elina**

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### **Session 6**

**9:00 a.m.**

**St-Lazare/Hudson**

### **How to Build an Effective Company Culture at the Small Engineering Firm**

**Discussion Leader:**

**Montana Wilson, GRIT Engineering Inc.**

In today's fiercely competitive landscape, cultivating a robust and positive company culture is vital for the prosperity of small engineering firms. This session will offer actionable insights and strategies to help leaders create environments that attract top talent and inspire teams to excel. By emphasizing leadership, communication, and employee engagement, we will explore ways to foster innovation, collaboration, and satisfaction throughout the organization.

Participants will benefit from hearing the firsthand experiences of industry peers who are equally committed to nurturing thriving workplaces. Through real-world examples and case studies, we will examine the tangible impact a strong culture can have on business performance and employee wellness.

The discussion will also highlight the array of support systems available to senior leaders, including financial management, operational resources, and leadership development opportunities. As we strive to build workplaces rooted in trust, recognition, and autonomy, leaders must balance the demands of productivity with the need to maintain an atmosphere of open communication and psychological safety. While motivating teams to meet deadlines and targets is essential, long-term success depends on fostering engaged, resilient, and empowered employees who find meaning and purpose in their work.

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**10:15 a.m.**

**Refreshments & Check Out**

**Session 7**  
**10:40 a.m.**  
**St-Lazare/Hudson**

## **Ownership Strategies for Succession and Engagement**

**Discussion Leaders:**      **Yoshi Tanaka, Kontur Geotechnical Consultants Inc. & Sheldon Hudson, Al-Terra Engineering Ltd.**

This session will explore key challenges faced by founders of small firms—particularly how they can extract value from their ownership while keeping shares attractive to the next generation. Firms adopt vastly different strategies for valuing shares, often shaped by their ownership models. Traditional valuation methods are increasingly proving inadequate, especially as companies transition from small to intermediate or larger sizes.

A growing concern is the limited uptake of recent share offerings among younger employees. Many view ownership as a constraint rather than an opportunity, prioritizing financial flexibility and housing over equity. This shift in mindset calls for a deeper understanding of how employee values align—or conflict—with ownership incentives.

How can firms reconcile their succession planning and business continuity goals with the evolving expectations of their workforce? This session will address these questions and offer insights into building sustainable ownership models that resonate across generations.

- Explore the pros and cons of Employee Stock Ownership Plan (ESOPs, direct share offerings, and cooperative models)
- Address the complexities of funding employee ownership (e.g., vendor financing, dividend-backed loans) and ensuring fair valuation of shares
- Discuss how ownership structures can support tax optimization, estate planning, and business continuity. (i.e. HOLDCO/TRUST setups and capital gains exemptions)
- Consider how ownership affects governance. Should employees have voting rights? How do firms balance transparency, control, and engagement in decision-making?
- Examine how share ownership can be used as a strategic tool compete for top talent, foster loyalty, and reduce turnover, and ultimately shape company culture,
- Discuss strategies for positioning a firm for ownership transition or sale, with a focus on maximizing value and aligning with long-term succession goals



**Session 8**  
**11:45 a.m.**  
**St-Lazare/Hudson**

## **Forum Recap and Role for ACEC-Canada**

**Discussion Leaders:**      **Doug Coles, ACEC Chair &**  
   **John Gamble, ACEC President and CEO**

This final session will be a roundtable dialogue on the following:

- Feedback on the 2025 Forum, should we host a 2026 Forum? If so, areas of improvement/enhancement from the participants perspective
  - Is ACEC-Canada spending its time and resources on the right issues from the Small Firms perspective?
  - How could ACEC-Canada better engage member firms' employees and serve their teams?
  - The role of ACEC-Canada and industry leaders as policy influencers.
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**12:15 p.m.**  
**Restaurant Villa Elina**

## **Closing Luncheon**

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**1:15 p.m.**

## **Departure at Participants Leisure**