





David Kehm, Managing Principal HDA Architects

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IV.SUMMARY



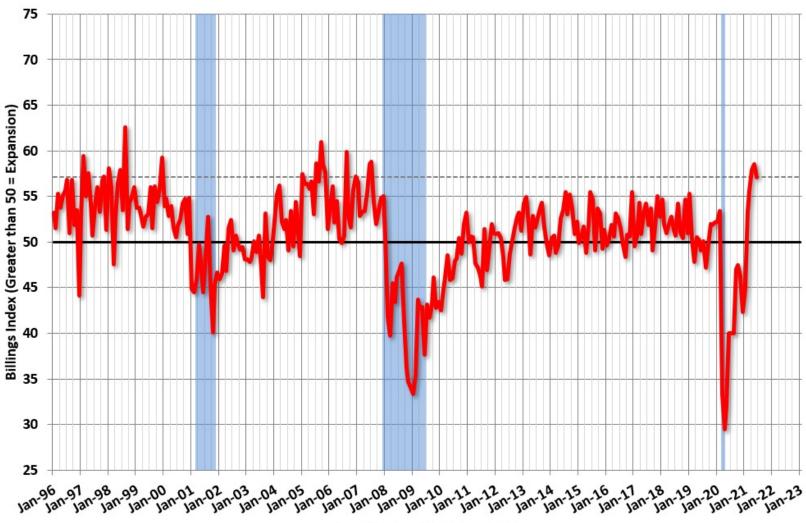
- ABNA ENGINEERING NICOLE ADEWALE PRINCIPAL
- ARCTURIS CHRISSY HILL ROGERS –
 DIRECTOR ARCHITECTURE
- ALPER AUDI WARREN BERGQUIST PRINCIPAL
- CANNONDESIGN TOM BERGMANN EXECUTIVE DIRECTOR
- CHRISTNER ARCHITECTS SHANNA WIECHEL
 MANAGING PRINCIPAL, OPERATIONS
- DAVID MASON ASSOCIATES TAYLOR MASON – PRINCIPAL
- ENGENUITY DARRELL JACOBS PRINCIPAL
- FAITH GROUP FAITH VARWIG OWNER

FORECAST PARTICIPANTS

- HDA ARCHITECTS DAVID KEHM –
 MANAGING PRINCIPAL
- IMEG JIM KAPPELER & MATT CHANDLER PRINCIPALS
- JACOBS AIMEE ROWBOTTOM DISCIPLINE DIRECTOR
- JEMA JOHN MUELLER PARTNER
- KAI MICHAEL KENNEDY, JR CEO
- LAWRENCE GROUP MICHAEL SCHNAARE –
 PRESIDENT
- ROSS & BARUZZINI JEFF CRAWFORD –
 DIRECTOR HIGHER ED
- SSC ENGINEERING CHRIS CORNETT PRINCIPAL

AIA ABI 25 YEARS

Architecture Billings Index



http://www.calculatedriskblog.com/

AIA ABI 1 YEAR

National

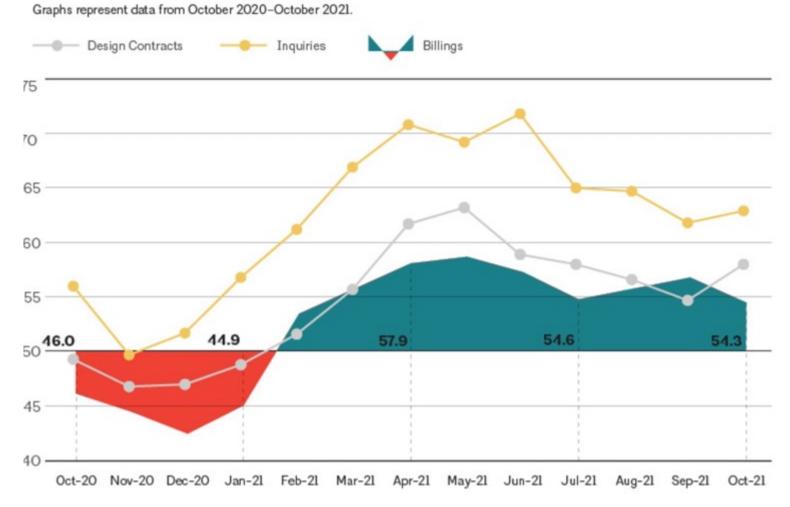
Architecture firm billings remain on a steady trajectory in October





Below 50







Billings

Design Contracts

Current

54.3

Current

58.0

Last month

56.6

Last month

54.7



Above 50



Below 50



50

FIRM #1 - E

MARKETS

- STRONG
 - MULTI-FAMILY
 - DUE DILIGENCE FOR ACQUISITIONS
- STEADY
 - HEALTHCARE
 - CORPORATE OFFICE
 - HOTELS

HIRING

- LAST 6 MONTHS
 - HELD STEADY
- NEXT 6 MONTHS
 - HIRE 6 PEOPLE

COVID

HYBRID, BUT MOST PEOPLE IN THE OFFICE

FIRM #2 - A

MARKETS

- STRONG
 - HEALTHCARE
 - HIGHER EDUCATION
 - o PRIVATE K-12
 - o CULTURAL
- STEADY
 - CORPORATE OFFICE

HIRING

- LAST 6 MONTHS
 - o ADDED 6 PEOPLE
- NEXT 6 MONTHS
 - HIRE 6 PEOPLE

- HYBRID 75% OF EMPLOYEES IN THE OFFICE
- FIRM LEADERS IN EVERY DAY
- NEW EMPLOYEES IN EVERY DAY FOR MENTORING
- WEAR MASKS WHEN WALKING AROUND

FIRM #3 - E

MARKETS

- STRONG
 - SOLAR
 - K-12 (2022 BOND ISSUES)
- STEADY
 - O HEALTHCARE
 - HIGHER EDUCATION
 - MUNICIPAL (POLICE & FIRE STATIONS)
 - JUSTICE (ILLINOIS CDB)

HIRING

- LAST 6 MONTHS
 - ADDED 6 PEOPLE
- NEXT 6 MONTHS
 - HIRE 12 PEOPLE

- HYBRID FOR NEW EMPLOYEES, ANYTHING OTHER THAN HYBRID IS NON-STARTER
- NEW POLICY STARTING JAN 1 2 DAYS A WEEK IN THE OFFICE

FIRM #4 - E

MARKETS

- STRONG
 - TRANSPORTATION
- STEADY
 - LOGISTICS
 - WASTEWATER
- WEAK
 - DEVELOPERS
 - CORPORATE OFFICE

HIRING

- LAST 6 MONTHS
 - HELD STEADY
- NEXT 6 MONTHS
 - HIRE 10 PEOPLE

- HYBRID PARENTS OF SMALL CHILDREN WORKING FROM HOME
- 85% OF EMPLOYEES VACCINATED
- HIGHLY RECOMMEND EMPLOYEES GET VACCINATED
- WEAR MASK WHEN WALKING AROUND THE OFFICE

FIRM #5 - E

MARKETS

- STRONG
 - AVIATION
 - TRANSIT
- STEADY
 - o FEDERAL
- WEAK
 - HIGHER EDUCATION
 - COMMERCIAL

HIRING

- LAST 6 MONTHS
 - o ADDED 2 PEOPLE
- NEXT 6 MONTHS
 - HIRE 8 PEOPLE

- HYBRID 3 DAYS PER WEEK
- 100% VACCINE POLICY
- o 95% VACCINATED

FIRM #6 - A

MARKETS

- STRONG
 - HEALTHCARE
 - LABS
- STEADY
 - CORPORATE OFFICE
- WEAK
 - HIGHER EDUCATION

HIRING

- LAST 6 MONTHS
 - 20% GROWTH IN 2021
- NEXT 6 MONTHS
 - MANY POSITIONS

- HYBRID PROBABLY FOREVER
- LOTS OF FEDERAL WORK, SO FOLLOWING MANDATES

FIRM #7 - A

MARKETS

- o STRONG
 - HIGHER EDUCATION
 - o FEDERAL
- STEADY
 - o BIOTECH
- WEAK
 - CORPORATE OFFICE

HIRING

- LAST 6 MONTHS
 - o ADDED 8 PEOPLE
- NEXT 6 MONTHS
 - HOLDING STEADY

COVID

NOT BACK IN OFFICE YET



MARKETS

- STRONG
 - MULTI-FAMILY
 - DISTRIBUTION CENTERS
- STEADY
 - ENTERTAINMENT
 - HIGHER EDUCATION
- WEAK
 - CORPORATE OFFICE

HIRING

- LAST 6 MONTHS
 - o ADDED 2 PEOPLE
- NEXT 6 MONTHS
 - HIRE 2 PEOPLE

- o 100% IN THE OFFICE SINCE JUNE 2020
- MASKS FOR UNVACCINATED
- ZERO TRANSMISSIONS WITHIN OFFICE



MARKETS

- STRONG
 - MULTI-FAMILY
 - HEALTHCARE (BEHAVIORAL HEALTH)
- STEADY
 - SCIENCE & TECH
- WEAK
 - CORPORATE OFFICE (BUT PICKING UP WITH WORKPLACE STRATEGY STUDIES)

HIRING

- LAST 6 MONTHS
 - ADDED 8 PEOPLE
- NEXT 6 MONTHS
 - HOLDING STEADY

- HYBRID 3 DAYS PER WEEK IN THE OFFICE
- MASKED IN MEETINGS / NOT MASKED AT DESKS
- 95% VACCINATED

FIRM #10 - A

MARKETS

- STRONG
 - MULTI-FAMILY
 - DISTRIBUTION CENTERS
- STEADY
 - HOTELS
- WEAK
 - CORPORATE OFFICE

HIRING

- LAST 6 MONTHS
 - o ADDED 3 PEOPLE
- NEXT 6 MONTHS
 - HIRE 1 KEY PERSON

- o IN OFFICE SINCE JUNE 2020
- HYBRID 85% OF EMPLOYEES IN OFFICE EVERY DAY
- 95% VACCINATED
- MASKS FOR UNVACCINATED

FIRM #11 - E

MARKETS

- STRONG
 - HEALTHCARE
 - o GSA
 - o VA
- STEADY
 - CORPORATE OFFICE
- o WEAK
 - HIGHER EDUCATION

HIRING

- LAST 6 MONTHS
 - ADDED 6 PEOPLE
- NEXT 6 MONTHS
 - HIRE 2 PEOPLE
 - NEW GRADS ACROSS ALL DISCIPLINES

- IN OFFICE SINCE JUNE 2020
- HYBRID BUT MOST EMPLOYEES IN OFFICE
- MASKS WHEN WALKING AROUND OFFICE
- NO MEETINGS IN CONFERENCE ROOMS

FIRM #12 -

MARKETS

- STRONG
 - o HEALTHCARE
 - HIGHER EDUCATION
 - AVIATION
- STEADY
 - o K-12
- WEAK
 - CORPORATE OFFICE

HIRING

- LAST 6 MONTHS
 - o ADDED 10 PEOPLE
- NEXT 6 MONTHS
 - HIRE 15 PEOPLE

COVID

100% BACK IN OFFICE – A FEW HYBRID PERIODICALLY

FIRM #13 - E

MARKETS

- STRONG
 - HEALTHCARE
 - o PUBLIC K-12
 - DISTRIBUTION CENTERS
- STEADY
 - SENIOR LIVING
 - MULTI-FAMILY
 - HOTELS
- WEAK
 - RETAIL

HIRING

- LAST 6 MONTHS
 - o ADDED 2 PEOPLE
- NEXT 6 MONTHS
 - HIRE 3 PEOPLE

- NEVER DID WORK REMOTELY
- WEAR MASKS WALKING AROUND THE OFFICE
- MOST EMPLOYEES VACCINATED, BUT NOT 100%

FIRM #14 - E

MARKETS

- STRONG
 - HIGHER EDUCATION
 - SCIENCE & TECH
 - GOVERNMENT
- STEADY
 - AVIATION
 - HEALTHCARE
- WEAK
 - SENIOR LIVING
 - MULTI-FAMILY

HIRING

- LAST 6 MONTHS
 - ADDED 8 PEOPLE
- NEXT 6 MONTHS
 - HIRE 10 PEOPLE

- HYBRID 50% IN THE OFFICE ON ANY GIVEN DAY
- MUST BE VACCINATED TO WORK IN OFFICE

FIRM #15 - A

MARKETS

- STRONG
 - MULTI-FAMILY
 - MUNICIPAL WORK
 - o TECH SCHOOLS
- STEADY
 - HOSPITALITY
- WEAK
 - CORPORATE OFFICE

HIRING

- LAST 6 MONTHS
 - ADDED 4 PEOPLE
- NEXT 6 MONTHS
 - HIRE 2 PEOPLE

- HYBRID, BUT PREFER PEOPLE IN OFFICE
- WEAR MASKS WHEN MOVING AROUND OFFICE
- 2 BREAKTHROUGH CASES, SO WENT BACK HOME FOR A FEW WEEKS, BUT NOT TRANSMITTED WITHIN OFFICE



MARKETS

- STRONG
 - HEALTHCARE
 - COMMERCIAL / RETAIL
- STEADY
 - CORPORATE OFFICE
- WEAK
 - HIGHER EDUCATION
 - SENIOR LIVING
 - MULTI-FAMILY

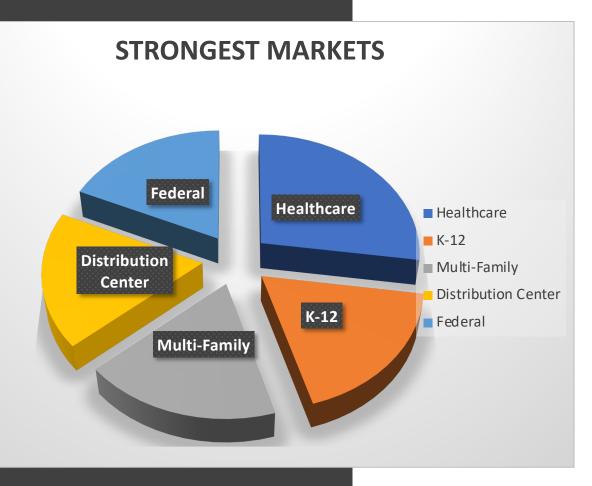
HIRING

- LAST 6 MONTHS
 - o ADDED 10 PEOPLE
- NEXT 6 MONTHS
 - HIRE 10 PEOPLE

- STILL WORKING FROM HOME
- HYBRID 3 DAYS PER WEEK STARTING JANUARY 2022
- 85% VACCINATED
- UNVACCINATED WEAR MASK AT ALL TIMES

STRONG MARKETS





- HEALTHCARE
- o K-12
- MULTI-FAMILY
- DISTRIBUTIONCENTERS
- o FEDERAL





STEADY MARKETS

HIGHER EDUCATION

HOTELS





WEAK MARKETS

CORPORATE OFFICE

SENIOR LIVING

WORKFORCE



HIRING

LAST 6 MONTHS

o ADDED 5
PEOPLE ON
AVERAGE
NEXT 6 MONTHS
o HIRE 6 PEOPLE
ON AVERAGE





COVID UPDATE

 MOST FIRMS BACK IN OFFICE & WORKING HYBRID

