

March 2023 | New Orleans, LA

EFMR

Environmental Facilities Management Roundtable

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Partner Engineering and Science, Inc. (Partner) is a national firm offering full-service engineering, environmental and energy consulting and design services. Our multidisciplinary approach allows us to serve clients at all stages from initial due diligence and design to development and construction, as well as the ongoing maintenance and optimization of a real estate asset.

COFFEE BREAK SPONSOR

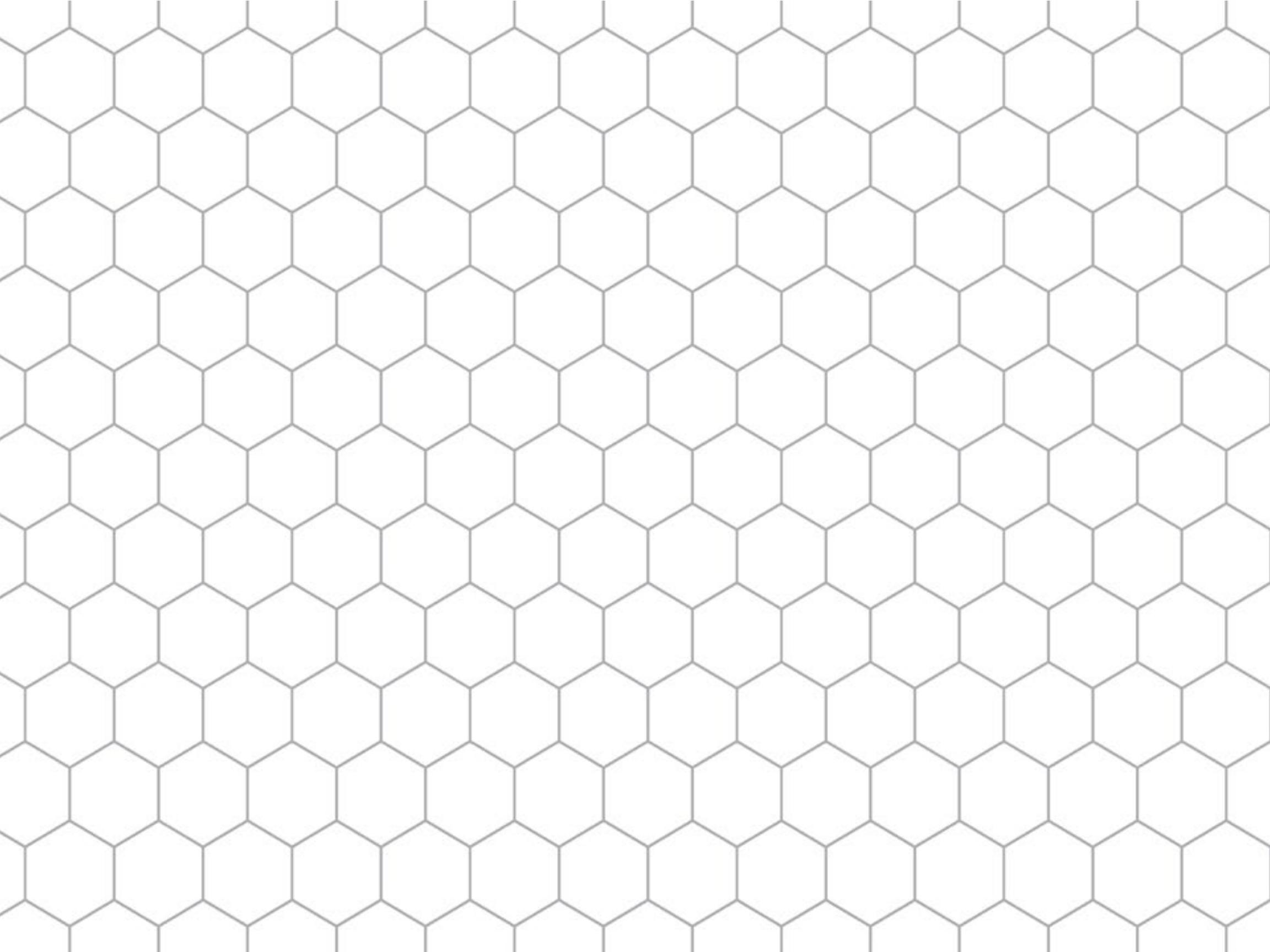


LOCKTON is the world's largest independent insurance brokerage providing customized solutions to meet your organization's risk, benefits and retirement needs. We bring creative thinking and an entrepreneurial spirit to the insurance business and are uniquely positioned to help you succeed. No matter your industry, Lockton has solutions for your business needs.

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U.S. Green Building Council is committed to transforming how our buildings are designed, constructed and operated through LEED, the world's most widely used green building system, with more than 120,000 buildings participating today. Our vision is that buildings and communities will regenerate and sustain the health and vitality of all life within a generation. Our mission is to transform how buildings and communities are designed, built and operated, enabling an environmentally and socially responsible, healthy, and prosperous environment that improves the quality of life.



Welcome

Welcome to the 1st annual Environmental Facilities Management Roundtable! Over the last few years this community has expanded online thanks to our regional meetings, recurring webinars, and LinkedIn forum. The growth and loyalty in this community over the last years has been incredible.

The 2023 national meeting will cover diverse topics such as Challenges in Operational EHS, Contaminated Properties, Renewable Energy, and an Economic Update. Thank you for being an integral part of the mission of this group and, if this is your first time attending, we look forward to your participation. Let the sessions commence!

Get Connected!

There are several ways to get involved in the EFMR community and stay connected throughout the year.

- Regional Meetings & Calls

Regional meetings and monthly calls provide a way to join discussions even if you can't make the trip for the annual meeting. Meetings that take place across the country make it possible to get to know peers and share your latest concerns. Calls cover topics like stored materials and costs as well as development of white papers and guidance.

- LinkedIn

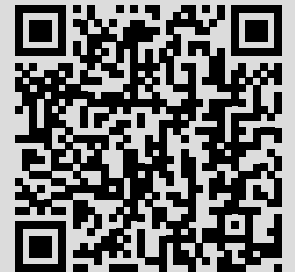
Join us on LinkedIn. Search Environmental Facilities Management Roundtable Group and request to join or visit <https://www.linkedin.com/groups/12530758>

- Become a Member

To become a member, you simply participate! Contact us to find out more about the schedule for monthly calls and regional forums (held across the U.S.) that you can take part in.

Additionally, please let us know if you are interested in submitting a topic for a call or event, would like to be notified of an event, or are interested in hosting a regional EFMR in your city.

Contact us at kjavier@partneresi.com. You can also visit us at www.environmental-facilities-management-roundtable.org.





Hotel Monteleone





THURSDAY

MARCH 30

THURSDAY SCHEDULE

ALL SESSIONS ARE LOCATED IN THE HOTEL MONTELEONE UNLESS OTHERWISE NOTED.

7:00 AM – 8:00 AM	Networking Breakfast	ROYAL ROOM	GROUND LEVEL
8:15 AM	Host Spotlight [Kathryn Peacock, Principal – National Client Manager, Partner ESI]	QUEEN ANNE BALLROOM	SECOND LEVEL
8:30 AM – 8:45 AM	Keynote [Speaker: Galina Chadwick, PE, SVP, Environmental Manager, Bank of America]		
8:45 AM - 9:00 AM	Benchmarking Survey Review		
9:00 AM - 9:45 AM	Challenges in Operational EHS - Roundtable Discussion Topics will include moisture intrusion, asbestos, and indoor air quality from prevention and resilience, to response, remediation, and closure. [Facilitated by Geraldine Tan, Head of Environmental Health Safety, Global Real Estate, JPMorgan Chase; and Mike Ebel, Director Strategic Development, Partner ESI]		
9:45 AM - 10:00 AM	Networking Break	BALLROOM FOYER	SECOND LEVEL
10:00 AM - 11:00 AM	Contaminated Properties, A Legal Outlook This panel of environmental attorneys will discuss due diligence from the development and redevelopment perspective, emphasizing emerging trends and contaminants. [Panelists: David Hunter, Technical Director, Partner ESI; Larry Falbe, Principal, Miller Canfield; Keith Walker, Partner, Cox Castle, & Nicholson; Andrew Cooper, Partner, DLA Piper; and Gwen Keyes Fleming, Partner, DLA Piper]	QUEEN ANNE BALLROOM	SECOND LEVEL
11:00 AM - 12:30 PM	Pitfalls During Development and Legal Issues Roundtable Discussion [Facilitated by Larry Falbe, Principal, Miller Canfield]		
12:30 PM - 2:00 PM	Lunch	ROYAL ROOM	GROUND LEVEL
2:00 PM - 3:00 PM	Ongoing Use and Record-Keeping Roundtable Discussion A conversation about record keeping and data storage management with an emphasis on regulatory compliance. [Facilitated by Elizabeth Romano, National Client Manager, Partner ESI; Galina Chadwick, PE, SVP, Environmental Manager, Bank of America; Will Sims, Compliance Coordinator, Link Logistics; and Valerie Young, Associate Director, Compliance, Link Logistics]	QUEEN ANNE BALLROOM	SECOND LEVEL
3:00 PM - 3:45 PM	Environmental Issues for Tenants and Landlords Best practices for managing environmental issues from the owner and tenant perspective. [Facilitated by Jeff Watson, Vice President, Environmental Risk Management, Revantage]		
3:45 PM - 4:00 PM	Networking Break	BALLROOM FOYER	SECOND LEVEL
4:00 PM - 4:30 PM	Breakout Discussions Breakout sessions will include life safety, environmental insurance, environmental compliance, green building certifications, and more! Attend a session with USGBC and get entered for a TRUE Advisor Professional Credential.	QUEEN ANNE BALLROOM	SECOND LEVEL
4:30 PM	Sessions Conclude	SECOND LEVEL	SECOND LEVEL
5:30 PM - 7:30 PM	NOLA History Walking Tour and Drink Stop	OFFSITE	
7:30 PM - 9:30 PM	Antoine’s Restaurant for Dinner and Drinks	OFFSITE	
9:30 PM	Mahogany Bar for Live Music	OFFSITE	



FRIDAY

MARCH 31

FRIDAY SCHEDULE

ALL SESSIONS ARE LOCATED IN THE HOTEL MONTELEONE UNLESS OTHERWISE NOTED.

7:30 AM – 8:30 AM	Networking Breakfast	ROYAL ROOM	GROUND LEVEL
8:30 AM – 9:30 AM	ESG+R Roundtable Discussion A discussion of how ESG policies impact facilities managers with an emphasis on the proposed mandatory SEC climate-risk disclosure rule, data collection and reporting, and regional and regulatory updates, including the ASTM standard for resiliency. [Facilitated by Kristi Balsanek , Partner, DLA Piper]	QUEEN ANNE BALLROOM	SECOND LEVEL
9:30 AM – 10:15 AM	The Regulatory Landscape – What’s on the Horizon? An overview of laws and regulations that impact facilities managers with an emphasis on trends in enforcement, emerging contaminants, vapor intrusion, ESG, recycling, and compliance. [Speaker: John Epperson , Of Counsel, Buchalter]		
10:15 AM - 10:30 AM	Networking Break	BALLROOM FOYER	SECOND LEVEL
10:30 AM - 11:15 AM	Regional Challenges Roundtable Discussion A follow-up to the Regulatory Landscape presentation, where we will discuss regional regulations and their impact on facilities managers [Facilitated by John Epperson , Of Counsel, Buchalter]	QUEEN ANNE BALLROOM	SECOND LEVEL
11:15 AM - 11:45 AM	Breakout Sessions Breakout sessions will include life safety, environmental insurance, environmental compliance, and more! Attend a session with USGBC and get entered for a TRUE Advisor Professional Credential.	BALLROOM FOYER	SECOND LEVEL
11:45 AM - 12:15 PM	Breakout Summaries Leaders of breakout discussions will provide a summary of recommendations and next steps for key topics.		
12:15 PM - 12:30 PM	Closing, Feedback Session	QUEEN ANNE BALLROOM	SECOND LEVEL
12:30 PM	Boxed Lunches	ROYAL ROOM	GROUND LEVEL
1:30 PM	Optional Activities	OFFSITE	

BREAKOUT SESSIONS

Environmental Compliance	David Dumond , Technical Director/National Practice Leader, Partner ESI
Environmental Insurance	Kate Dietrich , VP, AE, Sr Environmental Specialist, Lockton
Life Safety	Jeff Goeden , Corporate Environmental Manager, Allstate Insurance Company
ESG, Recycling, Waste, and More!	Susie Vincent , Director, TRUE, U.S. Green Building Council
What’s on your mind? Open Discussion	Elizabeth Romano , National Client Manager, Partner ESI, and Galina Chadwick , PE, SVP, Bank of America

The background of the image is a repeating pattern of light gray hexagons, creating a honeycomb or cellular texture. The hexagons are arranged in a staggered grid, with each hexagon touching its six neighbors.

NASHVILLE, TN

MARCH 2024

EFMR SPEAKERS

MARCH 2023

THURSDAY SPEAKERS



Kathryn Peacock

Partner Engineering and Science, Inc.
Principal, National Client Manager

Kathryn Peacock serves as Principal and National Client Manager for Partner Engineering and Science, Inc. With 20 years of experience under her belt, Kathryn has worked on thousands of transactions, subsurface investigations, and site remediation projects for some of the nation's largest lenders and investors. She holds a bachelor's degree in Soil Science from Prescott College and a Master's in Education from the Arizona Teachers Institute. Kathryn speaks and writes frequently on a wide range of environmental due diligence topics, and is dedicated to advancing standards and best practices through her active involvement with industry associations such as ASTM. Kathryn is also a founding member of EFMR (Environmental Facilities Management Roundtable). Environmental Professionals are frequently unique within their companies, having few peers who understand the unique challenges of their day-to-day. This group was formed to help facilitate dialogue amongst industry professionals.



Galina Chadwick, PE

Bank of America
SVP, Environmental Manager

Galina Chadwick is a Senior Vice President with the Global Real Estate Services Team of Bank of America. Her current responsibilities include oversight of facility vendor execution all real estate related Environmental, Health, Safety (EHS) programs. Ms. Chadwick, a licensed Professional Engineer, has more than 30 years of environmental engineering, project management and program management experience dedicated to integration of environmentally responsible practices into business operations with an emphasis on reducing EHS risks. Her Federal and State agency experience is specialized in contaminated properties remediation project management and Superfund program development. Her extensive private sector experience in chemical and finance industries has focused on the development and implementation of comprehensive, sustainable environmental management systems, strategies, and associated metrics to measure and minimize EHS operational risks.



Geraldine Tan

JPMorgan Chase
Head of Environmental Health Safety, Global Real Estate

Geraldine Tan is the Head of Environmental Health Safety, Global Real Estate for JPMorgan Chase & Co who has provided innovative financial solutions for consumers, small businesses, corporations, governments and institutions around the world for over 200 years. Today, they're a leading global financial services firm with operations servicing clients in more than 100 countries. Whether they are serving customers, helping small businesses, or putting our skills to work with partners, we strive to identify issues and propose solutions that will propel the future and strengthen both our clients and our communities.

THURSDAY SPEAKERS



Mike Ebel

Partner Engineering and Science, Inc.
Director Strategic Development - Industrial Hygiene

Mike Ebel is an experienced VP/Principal Scientist with a demonstrated history of working in the industrial hygiene/indoor air quality arena. Skilled in Environmental Awareness, Environmental Consulting, Indoor Air Quality, Asbestos, Mold, Sustainability, and Environmental Science. Strong education professional with a Associate of Architecture focused in Architecture from Kirkwood College and continued education from Harvard School of Public Health, University of North Carolina Chapel Hill School of Public Health and University Missouri-Columbia. Mr. Ebel is often requested to provide expert and factual witness/testimony with recent trials and depositions in Iowa, Tennessee, Illinois and Puerto Rico.



Dave Hunter

Partner Engineering and Science, Inc.
Technical Director

Dave Hunter has more than 30 years providing scientific and environmental consulting for industrial, commercial, institutional and governmental clients on varied projects. He drives business success by delivering boutique client service and sophisticated technical analysis. As an at-large Technical Director, Mr. Hunter leverages Partner's considerable environmental and property consulting experts to manage projects with complex environmental, natural resources and facility conditions. He also assists relationship management teams across the Partner platform with commercial due diligence projects that require a finessed approach on sensitive transactions. His specialties include management of consulting operations, environmental due diligence for real property transactions, subsurface assessment and remediation, hydrogeology, natural resources, remedial construction and operations, remedial optimization, risk assessment, geophysical surveying, indoor air quality/vapor intrusion consulting and general industrial hygiene. Mr. Hunter holds Professional Geologist credentials in the states of NC, SC and GA.



Larry Falbe

Miller Canfield
Principal

Larry Falbe is an environmental attorney whose national practice focuses on transactional support of real estate and corporate deals, environmental and health & safety compliance and litigation, environmental criminal enforcement defense, voluntary self-disclosure of environmental violations, Brownfields issues, climate change, environmental justice aspects of development, and Environmental, Social and Corporate Governance (ESG) issues. Larry has represented clients involved in enforcement actions by federal, state and local authorities and has negotiated numerous compliance programs, consent decrees and settlements. He also completed internships with the U.S. Department of Justice, Environmental Enforcement Division and the U.S. Environmental Protection Agency, Region 5. Larry has substantial litigation and regulatory experience involving CERCLA (Superfund), OSHA, FIFRA, EPCRA, RCRA (hazardous waste), toxic torts, Clean Water and Clean Air Acts, underground storage tanks, and so-called "emerging contaminants," including per- and poly-fluoroalkyl substances (PFAS).

THURSDAY SPEAKERS



Keith Walker

Cox, Castle, & Nicholson, LLP
Partner, Environmental Attorney

For 15 years, Keith Walker has practiced environmental law. His main form of expertise is in brownfield redevelopment and complex remediation and human health risk mitigation projects in the context of federal, state and local regulatory compliance in order to obtain the much sought-after “No Further Action” letters. His practice also involves the performance of extensive environmental risk management in the pre-acquisition, financing and development phases. In addition, his work includes cost recovery litigation in both state and federal court. Keith Walker represents residential, commercial and industrial developers, specializing in complicated sites with long and tricky histories, all while navigating a rapidly-changing regulatory landscape where cleanup and exposure standards are completely in flux. His technical knowledge regarding the science behind the decisions of the regulatory agencies enables him to problem-solve and help clients through to achieve written regulatory closure in the perspective of purchasing, redeveloping, leasing and/or divesting properties and real estate portfolios, often taking the same client through each of these processes.



Andrew Cooper

DLA Piper
Partner

Andrew Cooper brings 30 years of experience representing numerous clients where potential environmental liability was at issue in hundreds of transactions, as well as in litigation and compliance work. His deep experience and broad knowledge serve to minimize, shift or eliminate issues of concern to clients in this area. In the environmental aspects of both transactions and litigation, Drew has a keen understanding of how to get the deal done and the claim resolved, and in the compliance realm, he provides top-notch, preventative legal guidance. He frequently advises purchasers, sellers, lenders or borrowers on environmental matters. Drew also has substantial experience litigating environmental claims and negotiating with federal and state agencies, including taking several environmental cases to trial.



Gwen Keyes Fleming

DLA Piper
Partner

Strength in building relationships, advising on complex legal and regulatory matters, in-depth knowledge of local, state and federal governments, and helping clients achieve their business and operational imperatives are at the heart of Gwen Fleming’s practice. Gwen advises a wide variety of business, institutional and organizational clients on all aspects of environmental policy, government relations, compliance planning, incident response, subsequent enforcement and litigation matters and special investigations for private and municipal clients. She also advises clients on environment, social and governance (ESG) issues and the impacts climate change can have on business operations. Gwen spent more than twenty years in the public sector, serving as both an elected and appointed official at the state and local levels, as well as in various branches of the federal government. She served as Principal Legal Advisor (General Counsel) for Immigration & Customs Enforcement (ICE) in the U.S. Department of Homeland Security (DHS) and as Chief of Staff to the Environmental Protection Agency (EPA) during the Obama Administration.

THURSDAY SPEAKERS



Elizabeth Romano

Partner Engineering and Science, Inc.
National Client Manager

Ms. Romano currently serves as a National Client Manager for Partner Engineering and Science, Inc. She is responsible for supporting clients and driving sales within the Charlotte, NC, market, and corporate/commercial real estate space. Over the last 13 years, Ms. Romano has been helping local, regional, national, and international clients with environmental and infrastructure solutions to successfully manage their real estate portfolios. She has been vital in developing and implementing an environmental risk governance program for a Fortune 50 banking client where her team developed a program to help govern the client's domestic real estate portfolio of approximately 6,000 banking, administrative, and data center facilities from an environmental risk perspective. This program included a comprehensive series of onsite and desktop environmental audits annually, as well as targeted programmatic checks and balances to ensure outsourced vendors are managing the bank's facilities in alignment with its Environmental Management System.



Will Sims

Link Logistics
Compliance Coordinator

Will Sims is a Compliance Coordinator at Link Logistics where strong environmental, social and governance (ESG) practices are core to our identity as a firm. Our 2021 ESG report recaps our progress during the calendar year and shows how we will continue to redefine what sustainability looks like in the industrial real estate sector. Link seamlessly manages the entire process of delivering facilities that support our customers' long-term growth strategies. Link owns the largest portfolio of U.S.-only industrial real estate. Our scale is expansive, our technology is leading-edge and our people are talented contributors who bring a passion for what we do.



Valerie Young

Link Logistics
Associate Director, Compliance

Valerie Young is an Associate Director in Compliance at Link Logistics where strong environmental, social and governance (ESG) practices are core to our identity as a firm. Our 2021 ESG report recaps our progress during the calendar year and shows how we will continue to redefine what sustainability looks like in the industrial real estate sector. Link seamlessly manages the entire process of delivering facilities that support our customers' long-term growth strategies. Link owns the largest portfolio of U.S.-only industrial real estate. Our scale is expansive, our technology is leading-edge and our people are talented contributors who bring a passion for what we do.

THURSDAY SPEAKERS



Jeff Watson

Revantage/Blackstone Real Estate
Vice President, Environmental Risk Management

Jeff Watson is an Environmental Risk Director at Revantage where he manages due diligence for acquisitions, refinancing, disposals and providing risk management on environmental issues related to owned assets. Revantage is a global corporate services leader proudly serving Blackstone portfolio companies and investments. Blackstone's real estate portfolio includes logistics, rental housing, office, hospitality and retail properties in North America, Europe and Asia. Revantage's global reach supports Blackstone real estate portfolio companies with best-in-class talent and corporate services. From finance to technology to people and culture, they anticipate the needs of their partners and portfolio companies, hire exceptional talent and give them the platform to deliver. End result: their partners thrive.

FRIDAY SPEAKERS



Kristi Balsanek

DLA Piper
Partner

Ms. Balsanek has over 20 years of legal experience, practicing in both global law firm and in-house roles. She focuses her practice on advising on core Environmental, Social and Governance (ESG) related risk areas including business ethics, corporate governance, director/officer duties, anti-corruption, sanctions, labor and human rights, global supply chain transparency, climate change, green initiatives, environmental marketing, privacy and data protection among many others. Infusing a holistic, integrated and practical approach to ESG throughout businesses and organizations, Balsanek serves as a trusted advisor supporting their transition towards creating long term value and sustainability in a rapidly evolving legal and regulatory tapestry across the globe. She designs and implements risk-based compliance and governance programs including, but not limited to risk assessment, corporate policies and procedures, third-party due diligence, M&A, internal and government investigations, reporting, disclosures, audits and trainings. She represents companies in compliance related regulatory enforcement and litigation matters.



John Epperson

Buchalter
Environmental Attorney, Of Counsel

John Epperson is an experienced environmental attorney in the Buchalter law firm's San Francisco office. John has a wide range of experience in environmental, health and safety law. He counsels clients regarding regulatory compliance, transactional due diligence, permitting/entitlement issues, and he represents clients in administrative enforcement actions. His favorite area of practice is advising clients in their efforts to investigate and remediate contaminated properties, including associated cost recovery efforts and regulatory agency oversight and he teaches a class at Golden Gate University School of Law on that topic as an adjunct professor.



Steve Colton

Wells Fargo Bank
Vice President- Environmental Risk & Compliance

As the Vice President of the Environmental Risk & Compliance Group for Wells Fargo Bank, I oversee environmental compliance activities for thousands of Wells Fargo owned and leased properties throughout the United States. With over 30 years of diverse environmental management experience in the banking, industrial, and environmental consultant sectors, I have designed and implemented environmental compliance and risk mitigation programs that address many different aspects of environmental risk including: OSHA compliance, asbestos management, indoor air quality and mold issues, environmental due diligence for property transactions, and soil/groundwater remedial investigations and cleanups.

EVENING ACTIVITIES

ALL EVENING ACTIVITIES ARE OPTIONAL AND HIGHLY ENCOURAGED BY US AND OUR MEMBERS.

At the end of each conference day are evening activities for our EFMR registered guests. We hope after a long day of 'learn, share, and manage' you are able to loosen up in groups to experience something new in the historic New Orleans. As our guests, these activities are optional and also complimentary. We ask that you join us on Thursday and Friday night. Cheers!

THURSDAY



[NOLA Walking Tours, Dinner, & Live Jazz](#)

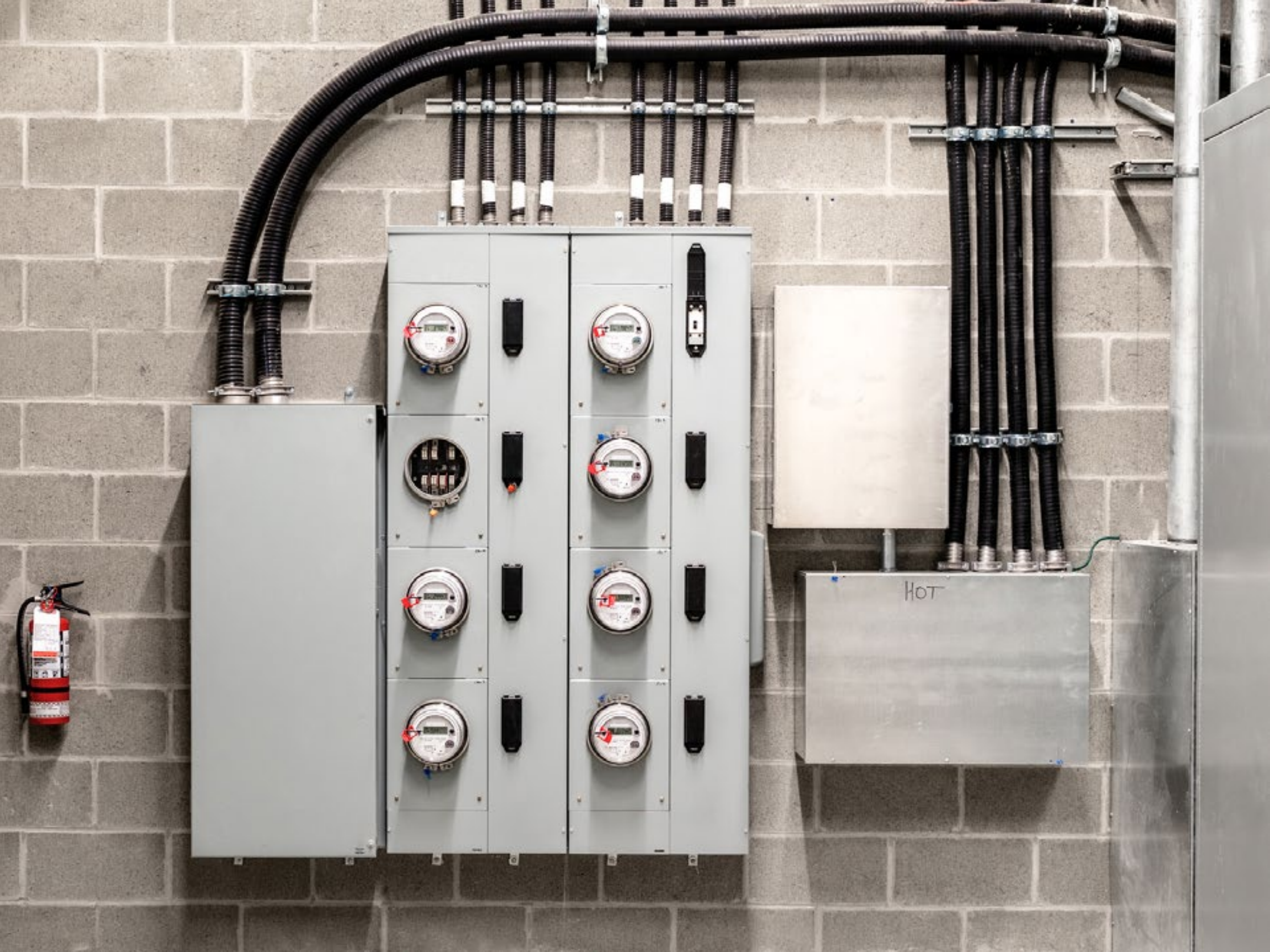
Join us for a walking tour of either the French Quarter's architecture, history, and people... or, join the Best Ghost tour to learn about why NOLA is considered America's most haunted city and visit top spots of paranormal activity. Next, our guests will dine at the famous Antoine's Restaurant for Dinner and Drinks. The last stop will be at NOLA Mahogany Jazz Hall! Guests will enjoy live Jazz music, cocktails, and absinthe amid vintage-style surroundings. The atmosphere is relaxed yet lively with rotating headliners.

FRIDAY



[RSVP @ Registration Table](#)

To participate in Friday night's activities please RSVP at the registration table. Details on location, time, and transportation will be given at registration.





Let's stay connected!

Scan to find everything EFMR related.



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