2015-2016
CFMA’S EDUCATION PROGRAMS
for Chapters & Regional Conferences

Best of CFMA’s Conference Programs
These seven renowned programs are available for CFMA Chapter and Regional Conference in-person presentations.

- Employee Development Strategies and Human Capital Risk Management
- DOL Confidential - Understanding ERISA Investigations & Your Fiduciary Duties
- How to Create an Organization of Highly Engaged Employees Who Think & Act Like Own
- Getting Things Done Through Emotionally Intelligent Leadership
- The Good, The Bad & The Ugly - OCIP/CCIP from a Subcontractor’s Perspective
- Schemes, Scams & Swindlers - Insights into Organizational Fraud
- Document Management, Project Management, Collaboration: Content Storage & Collaboration

Select Speaker Program
These four highly-rated speakers have agreed to offer their programs to CFMA Chapters and Regional Conferences with special discounts.

James Spellos
Robert Davidson
Anirban Basu
James Benham

Chapter CPE Guidance
CFMA can guide your Chapter through the steps to successfully issue CPE for your local education programming. For more info contact Brian Summers at: bsummers@cfma.org or 609.945.2408.

CFMA’s Chapter Classroom Courses
CFMA’s Chapter Classroom Courses are live classroom presentations made available through local CFMA Chapters, affiliated associations, or companies.

Education Database Search
This database is a powerful tool to assist Chapter leaders in finding valuable resources for national and local education programming. Chapter leaders can search by course, presentation, presenter, domain, and topic to receive a wealth of information including presentation title, course descriptions, speakers, and evaluation ratings. For more info contact Brian Summers at: bsummers@cfma.org or 609.945.2408.

STAR Program Info
Chapters can use all or part of their $3,000 STAR Program funds towards ANY education provided at the Chapter level.

FOR MORE INFORMATION CONTACT
Education Department • 609.452.8000 • education@cfma.org
2015-2016
SELECT SPEAKER Program

Anirban Basu, Chairman & CEO of Sage Policy Group, Inc., an economic and policy consulting firm in Baltimore, Maryland serves as CFMA’s Economic Advisor. Mr. Basu is one of the Mid-Atlantic region’s most recognizable economists, in part because of his consulting work on behalf of numerous clients, including prominent developers, bankers, brokerage houses, energy suppliers, and law firms. On behalf of government agencies and non-profit organizations, Mr. Basu has written several high-profile economic development strategies. He currently lectures at Johns Hopkins University in micro-, macro-, international, and urban economics.

For more information about Anirban, visit: www.sagepolicy.com/about/who-we-are
To secure Anirban Basu abasu@sagepolicy.com or 410.522.7243.

CFMA Discounted Presentation Fee: $2,900 + travel expenses

James Spellos’ area of expertise is using technology more efficiently. Jim is known to participants at CFMA National Conferences as well as CFMA Chapter members for his extremely highly rated presentations. At CFMA National Conferences, Jim has presented the following sessions:

- Social Tsunami: How to Drink from the Information Fire Hose Using a Straw
- Google-licious: How to Find Anything Online
- App-tastic: 75 Apps in 75 Minutes
- Smart Phones & Smarter Business
- Social Networking

His sessions are customized, so if a Chapter wants to create a program with, for example, some Google and some other Hot Technologies content, it can be done.

For more information about Jim, visit: www.meeting-u.com
To secure James Spellos jspellos@meeting-u.com or 718.224.5516.

CFMA Discounted Presentation Fee: $2,500 + travel expenses

James Benham, President of JB-Knowledge, Inc., makers of the SmartBidNet, SmartCompliance, SmartInsight and SmartReality cloud, mobile and wearable solutions, is a highly regarded technologist in the construction, insurance, and risk management industries. With extensive experience in the design and development of innovative technology to streamline fragmented business processes, James speaks across North America and abroad on business information systems, cloud security, and next generation technologies like wearables, drones, and augmented reality. James continually garners enthusiastic feedback and repeat requests for the following presentation topics:

- Construction Technology Forecast - Harnessing Integration, Mobile, Sensors, and Augmented Reality
- Webinar: Building Technology into Construction: The Must-Have Technology Toolbox
- Augmented Reality in Construction – How BIM and Mobile Devices Are Setting the Stage for the Future
- Global Ethics and Entrepreneurship: The Do’s and Don’ts of Doing Business Across Borders

Every year, James speaks at national and international construction industry events including CONEXPO, CFMA Annual Conference & Exhibition, AGC IT Forum, AGC Annual Convention, CONSTRUCT, CMAA, Construct Canada, and BIMForum. James was recognized among ENR Texas & Louisiana’s 2014 Top 20 Under 40 for his advancements in construction technology.

For more information about James, visit jamesbenham.com
To secure James Benham james@smartbidnet.com or 979.217.1550

CFMA Discounted Presentation Fee: $3,500 + Expenses

Robert Davidson, CPA, co-founded DGLF CPAs & Business Advisors (formerly Davidson, Golden & Lundy) in 1987 as an accounting and consulting firm primarily serving the construction industry. Robert’s leadership and 38 years of experience have made DGLF one of the most respected firms in the industry.

Throughout his career, Robert has built a reputation as an exceptional teacher and speaker. He travels frequently to share his expertise at construction industry conferences and seminars nationwide. Robert has delivered the following presentations, earning outstanding evaluation scores at the CFMA Annual Conference & Exhibition:

- Emerging Trends & Issues in Heavy & Highway Construction
- 10 Smart Things Contractors Should Do to Survive & Thrive
- Internal Controls, Procedures & Strategies to Prosper in Tough Times
- Analytical Procedures

To secure Robert Davidson rdavidson@dglfcpa.com

CFMA Discounted Presentation Fee: $3,000 - $5,000 per day negotiated on a case by case basis with Chapter.

Regional Conference Reimbursement
Regional Conferences securing any of the 2015-2016 Select Speakers or Best of Conference Speakers qualify for a $500 reimbursement.

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Employee Development Strategies and Human Capital Risk Management

Learning Objectives:
- Define human capital risk management and discuss the benefits of managing human capital as a tangible and intangible asset
- Discuss traditional personnel vs. current employee development vs. emerging talent management workforce challenges impacting the construction industry
- Discuss how employee development and talent management can counter the current and future workforce shortage
- Present an overview of the major employee development and leadership development models used by Lakeside Industries
- Facilitate an interactive roundtable among attendees to exchange lessons learned, success stories, and best practices

Presenters: Cal Beyer, Tana Blair and Tammy Vibbert
To secure this session contact Cal Beyer at cal.beyer@lakesideindustries.com or (651) 307-7883.

DOL Confidential - Understanding ERISA Investigations & Your Fiduciary Duties

Learning Objectives:
- Learn about the authority of the DOL, IRS, and PBGC under ERISA
- Recognize how and why a plan becomes selected for an investigation including red flags, targeted issues, and the DOL’s goals
- Learn about the process of the investigation, what the DOL is looking for, what your obligations are to provide information, and what you can expect
- Learn about your fiduciary obligations, duties, and governance best practices

Presenter: Sam Henson
To secure this session contact Christian Moreno at cmoreno@lockton.com or (214) 969-6162.

How to Create an Organization of Highly Engaged Employees Who Think & Act Like Own

Learning Objectives:
- Establish business acumen; teach employees the fundamentals of business so they can link the tasks they perform to business objectives and, ultimately, their incentive plans
- Instill transparency and accountability; identify key indicators, build scoreboards and rapid improvement plans, and create an environment of high visibility and accountability
- Provide incentives and equity sharing; build incentive and/or broad based equity plans that really work
- Find your organization’s higher purpose; move people beyond the entitlement mentality and toward a mentality of earning and purpose

To secure this session contact Garrett Sullivan at gsullivan@sullivanhi.com or (808) 478-2564.

Getting Things Done Through Emotionally Intelligent Leadership

Learning Objectives:
- Describe the links among physiology, emotions, and performance
- Choose a leadership style that brings out the best performance in others
- Adopt surprising new strategies for remaining calm and confident under pressure
- Proactively address the five social threats that undermine organizational change
- Identify elements of organizational culture that can trigger threat response and limit productivity

Presenter: Vanessa Kiley
To secure this session contact Vanessa Kiley at Vanessa@KileyandCo.com or (614) 462-5416.

The Good, The Bad & The Ugly – OCIP/CCIP from a Subcontractor’s Perspective

Learning Objectives:
- Describe potential gaps in coverage between a subcontractor’s policies and OCIP/CCIP program coverage
- Identify the steps that should be taken to protect your company if a claim arises
- Identify the risks and benefits of an OCIP/CCIP program to determine if your company should participate

Presenters: Don Gregory and Richard Usher
To secure this session contact Don Gregory at dgregory@keglerbrown.com or (401) 696-1415.

Schemes, Scams & Swindlers – Insights into Organizational Fraud

Learning Objectives:
- Learn the true cost and impact of fraud in the construction industry and how this affects your company and the industry
- Recognize the symptoms and warning signs of fraud when it’s occurring
- Learn about the inner workings of embezzlement and other fraud schemes through real-life examples
- Gain practical fraud risk reduction tips

Presenter: Jeffrey Roberts
To secure this session contact Jeffrey Roberts at jroberts@bkd.com or (614) 462-5416.

Document Management, Project Management, Collaboration: Content Storage & Collaboration

Learning Objectives:
- Review the different types of software solutions that store and organize documents, act as a collaborative platform for PM or document sharing, and host data
- Build a better understanding of which solutions may improve the document management system within their organization
- Provide clarity for the attendees on types of solutions in the marketplace without mentioning products specifically

Presenter: Christian Burger
To secure this session contact Christian Burger at crburger@burgerconsulting.com or (312) 651-4450.
### 2015-2016 CFMA CHAPTER Classroom Courses

**Group-Live Basic & Intermediate CPE Courses Available**

*All prices are per attendee/per book.*

<table>
<thead>
<tr>
<th>Course</th>
<th>Duration</th>
<th>Chapter Rate</th>
<th>Regional Conference Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Basics of Construction Accounting Workshop</td>
<td>Full-day</td>
<td>$85*</td>
<td>$25</td>
</tr>
<tr>
<td>Accounting &amp; Reporting</td>
<td>Half-day</td>
<td>$85*</td>
<td>$20</td>
</tr>
<tr>
<td>Cash Management</td>
<td>Half-day</td>
<td>$65</td>
<td>$25</td>
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<tr>
<td>Advanced Cash Forecasting</td>
<td>3 Hours</td>
<td>$55</td>
<td>$20</td>
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<tr>
<td>CCIFP Overview Seminar</td>
<td>Full-day</td>
<td>$100</td>
<td>$25</td>
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<tr>
<td>Contracts 101</td>
<td>Half-day</td>
<td>$65</td>
<td>$25</td>
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<tr>
<td>Emergency Management Planning</td>
<td>Half-day</td>
<td>$65</td>
<td>$25</td>
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<tr>
<td>Fundamentals of Ethics</td>
<td>2 Hours</td>
<td>$40</td>
<td>$10</td>
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<tr>
<td>Project Management</td>
<td>Half-day</td>
<td>$85*</td>
<td>$20</td>
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<tr>
<td>Risk Management</td>
<td>Half-day</td>
<td>$65</td>
<td>$25</td>
</tr>
<tr>
<td>Treasury Management Series (Parts 1-4)</td>
<td>2 Hours Per Module</td>
<td>$40</td>
<td>$10</td>
</tr>
</tbody>
</table>

**Discount:** Purchase all 4 parts: $100

**COMING SOON**

**360° View of Your WIP**

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