CFMA’s Strategic Plan

MISSION STATEMENT
To be essential to the success and growth of construction financial professionals.

CORE VALUES
INTEGRITY
Fostering a culture of ethical behavior in both business dealings and personal relationships.

COMPETENCY
Creating proficiency in our members and their employees.

RELATIONSHIPS/FRIENDSHIPS
Building and valuing personal and professional relationships, information sharing, and camaraderie.

LEADERSHIP
Advancing the profession; understanding what needs to be done and working with others to achieve it.

PROFESSIONAL/PERSONAL DEVELOPMENT
Helping each member continually grow and reach his or her full potential.

MEMBER-FOCUSED
Providing exceptional value to the member; relevant and timely resources; responsive to member needs, interests, and expectations.

Goals & Objectives

MEMBER VALUE
Members will regard CFMA as the essential construction financial resource, and CFMs will be viewed as leaders in the construction financial industry and an indispensable part of their company’s leadership team.

STRATEGIES:
- Provide the best educational content with multiple delivery formats
- Improve CFMA’s relevance and efficiency by capitalizing on technology
- Increase marketing and social media content and engagement
- Increase the promotion of the CCIFP designation as essential to career development for construction financial managers

COMMODITIES
Companies will recognize the significant value of CFMA education and engagement as an essential investment in their success.

STRATEGY:
- Develop alternative methods to demonstrate this goal by connecting with the members’ organization

EXTERNAL RELATIONS
CFMA will be the recognized authority in advancing sound financial and accounting practices in the construction industry and the leading resource for education, financial information, and issues that impact the construction industry.

STRATEGIES:
- Expand industry awareness of CFMA
- Increase number and scope of strategic partnerships with other industry-related organizations
- Promote awareness of mental health and suicide prevention to help create a zero suicide industry

CHAPTER RELATIONS
CFMA chapters will be vibrant, growing and viewed by stakeholders as the best local educational and networking resource for construction financial professionals.

STRATEGIES:
- Strengthen the infrastructure and resources to support chapter performance
- Reduce the burden of chapter administration on volunteers
- Support chapter administration to ensure consistency and efficiencies

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STRATEGIES:
- Strengthen the infrastructure and resources to support chapter performance
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- Support chapter administration to ensure consistency and efficiencies
Strategy and Policy: All board work is focused on the strategic, long-term direction of the organization, including external scanning, goal and strategy development, policy development, and overall evaluation and accountability.

Strategy, Policy, and Management: Most board work is focused on strategy and policy, but also includes some high-level management functions.

Management: The majority of the board's work is comprised of managing the operations of the organization, including planning, organizing, directing, supervising, and evaluating operations.

Management and Operations: The board spends most of its time managing the operations of the organization, but also serves as the actual workforce for certain administrative or programmatic operations.

Operations and Activities: The majority of the board's work is comprised of actually doing the frontline operational work of the organization, because board members also are the organization's volunteers.
2019 ANNUAL CFMA CHAPTER AFFILIATION AGREEMENT AFFIRMATION

This certifies that I have read and agree to the terms in this document and have read and confirm the information in the attached Chapter Affiliation Agreement. This affirmation is effective on this 1st day of April 2019, by and between the Construction Financial Management Association (“CFMA”), a New Jersey nonprofit corporation, with its principal place of business at 100 Village Boulevard, Suite 200, Princeton, NJ 08540, and ________________________________ [full corporate name of local chapter] (“CHAPTER”), a ________________________________ [state of incorporation] nonprofit corporation.

The chapter operates under the following guidelines:
A. All persons who choose to affiliate themselves with a local chapter must be members of CFMA.
B. All chapter dues will be collected by CFMA and disbursed to chapters quarterly.
C. A chapter is required to comply with the applicable sections of the CFMA bylaws and to incorporate in its state.
D. Chapter officers should consist of President, Vice President, Secretary and Treasurer. These officers must be elected by vote of that chapter’s members in accordance with the chapter’s bylaws. It is strongly recommended that the President and Vice President are General Members.
E. Chapter officers or its Board of Directors may establish committees, as they deem necessary. At a minimum each chapter should have a Program Committee and a Membership Committee.
F. The chapter is solely responsible for its financial obligations and is responsible for any state or other regulatory requirements resulting from its activity.

Each party agrees to the responsibilities below:

Summary of Responsibilities of CFMA
A. Provide benchmarking data to include but not limited to membership size, chapter retention rate, meeting attendance, chapter structure, chapter activities, and chapter leadership.
B. Provide chapter leaders with information and resources.
C. Make best practices information available to all chapters.
D. Schedule a periodic chapter visit with a goal of one visit per chapter every three years.
E. Present an annual Chapter Summit as a forum for chapters to discuss common challenges and opportunities.
F. Provide General Liability, Umbrella and Directors and Officers Liability insurance and provide declaration pages to chapters when needed.
G. Include CHAPTER as a corporation covered by CFMA’s group tax exemption under Section 501(c)(6) of the Internal Revenue Code.

Summary of Responsibilities of Chapters
A. Manage Chapter operations consistent with CFMA’s mission statement: To be essential to the success and growth of construction financial professionals.
B. Maintain CFMA’s Core Values of Integrity, Competency, Relationships and Friendships, Leadership, Innovation, Member Responsiveness
D. Submit proof of the chapter’s most recent annual tax return filing (copy of e-mail receipt is sufficient).

By: ________________________________
Name: Catherine A. Wasner
Title: Vice President, Member Services

By: ________________________________
Name: ________________________________
Title: ________________________________
CFMA CHAPTER AFFILIATION AGREEMENT

The parties agree as follows:

I. **Grant of Charter to CHAPTER**

   A. **Charter.** CFMA hereby grants to CHAPTER a non-exclusive charter to be a chapter of CFMA. CHAPTER is authorized to use the name “Construction Financial Management Association,” acronym “CFMA,” and logo of CFMA in or in connection with CHAPTER’s name, acronym and logo, with the authority to use such marks in connection with CHAPTER’s activities authorized under this Agreement, subject to the terms and conditions of this Agreement and any written guidelines attached to this Agreement, otherwise incorporated herein, or subsequently provided to CHAPTER by CFMA.

   B. **Term and Termination.** The Term of this Agreement shall commence on the effective date set forth above and shall continue until revoked by CFMA or surrendered by CHAPTER, pursuant to the terms of this Agreement for revocation and surrender.

II. **Summary of Responsibilities and Common Goals**

   CFMA and Chapter will each comply with the Summary of Responsibilities (“Responsibilities”) listed on the affirmation page of this Agreement, as such Responsibilities now exist or as they may hereafter be revised by the parties.

   CFMA and CHAPTER further agree to promote the purpose of CFMA as described in CFMA’s Bylaws, Article I and as described in CFMA’s Mission (to be essential to the success and growth of construction financial professionals) and Core Values (Integrity, Competency, Relationships and Friendships, Leadership, Innovation, Member Responsiveness).

III. **Mutual Support**

   CFMA agrees to provide guidance to Chapter for its governance and operations, to include a chapter tool kit, strategic planning facilitation and marketing support.

   Chapter agrees to conduct programs and activities that further the mission and purpose of CFMA, to encourage its members to participate in CFMA activities, and otherwise to support CFMA to the fullest reasonable extent possible.

IV. **Articles of Incorporation, Bylaws and Other Requirements**

   As a condition of approval as a chapter of CFMA, CHAPTER provided its Articles of Incorporation and Bylaws. Any amendments to CHAPTER’s Articles of Incorporation or Bylaws must be submitted to CFMA. Bylaws changes must be reviewed and approved by CFMA prior to adoption. CHAPTER agrees to abide by the Summary of Responsibilities of Chapters listed on the affirmation page of this Agreement, and shall comply at all times with all of the chapter-related requirements set forth in CFMA’s Bylaws.

V. **Compliance with Laws**

   CHAPTER warrants that it is in material compliance with all applicable laws, regulations and other legal standards that may affect its performance under this Agreement, and shall remain in material compliance with, and otherwise conduct its activities at all times in accordance with, all applicable laws, regulations, and other legal standards. Further, CHAPTER warrants that it shall maintain at all times all permits, licenses and other governmental approvals and shall make all required filings, such as annual reports and tax filings that may be required in connection with its performance under this Agreement.
Further, CHAPTER warrants that it is a nonprofit corporation in good standing with the laws of its local jurisdiction, and that it shall at all times operate in a manner consistent with the purpose of CFMA. CHAPTER shall maintain all records related to its corporate and tax status and forward to CFMA a copy of any adverse notice or other correspondence received from any governmental agency. CHAPTER shall notify CFMA in writing of any audit performed by any governmental agency within seven (7) days of the commencement of such audit.

CFMA warrants that it is in material compliance with all applicable laws, regulations and other legal standards that may affect its performance under this Agreement, and shall remain in material compliance with, and otherwise conduct its activities at all times in accordance with, all applicable laws, regulations, and other legal standards. Further, CFMA warrants that it shall maintain at all times all permits, licenses and other governmental approvals and shall make all required filings, such as annual reports and tax filings that may be required in connection with its performance under this Agreement.

VI. Intellectual Property

Limited License. CHAPTER is hereby granted a limited, revocable, non-exclusive license to use (i) the name "Construction Financial Management Association," acronym "CFMA," logo of CFMA, and other CFMA trademarks, service marks, trade names, and logos (collectively referred to as the "Marks"), (ii) CFMA's membership mailing and electronic mail lists with respect to past, current, or prospective members of CFMA located within the geographic area in which CHAPTER operates (collectively referred to as the "Mailing List"), and (iii) all copyrighted or proprietary information and materials provided by CFMA to CHAPTER during the Term of this Agreement (the "Proprietary Information") (the Marks, Mailing List, and Proprietary Information are collectively referred to as the "Intellectual Property") in or in connection with CHAPTER's name, acronym and logo and for other official CHAPTER-related purposes, with the limited authority to use the Intellectual Property solely in connection with the activities authorized under this Agreement, subject to the terms and conditions of this Agreement and any written guidelines attached hereto, otherwise incorporated herein, or subsequently provided to CHAPTER by CFMA.

A. The Intellectual Property is and shall remain at all times the sole and exclusive property of CFMA. CFMA's logo may not be revised or altered in any way, and must be displayed in the same form as produced by CFMA. The Marks may not be used in conjunction with any other trademark, service mark, or other mark without the express prior written approval of CFMA. CHAPTER shall not permit any third party to use the Intellectual Property without CFMA's express prior written approval. CHAPTER shall not sell or trade the Intellectual Property without CFMA's express prior written approval. The Intellectual Property must be used by CHAPTER in a professional manner and solely for official CHAPTER-related purposes.

B. Failure by CHAPTER to comply with the terms and conditions herein may result in the immediate suspension or revocation of this license, in whole or in part, by CFMA. Failure to comply also may result in the suspension or revocation of the charter of CHAPTER by CFMA, as described in CFMA's Bylaws, Article II, Section 6. All rights of usage of the Intellectual Property by CHAPTER shall terminate immediately upon the revocation, surrender or other termination of this Agreement. CHAPTER's obligations to protect the Intellectual Property shall survive the revocation, surrender or other termination of this Agreement.

C. Upon the termination or expiration of this agreement, CHAPTER shall (i) immediately cease utilization of the Intellectual Property; and (ii) return all originals and copies of the Intellectual Property (whether printed, electronic, recorded, or in other tangible form) at CFMA's request.
VII. **Relationship of Parties**

Neither party, nor any of its members, officers, directors, managers, agents, employees, independent contractors or representatives will (a) be considered an agent, partner, joint venturer, employee, or representative of the other party for any purpose whatsoever, (b) have any authority to make any agreement or commitment for, or to incur any liability or obligation in the other party’s name or for or on its behalf, and (c) represent to outside parties that they or any of them has any right to bind the other party to this Agreement. CHAPTER is not, and will not be deemed to be, for any purpose, an employee or agent of CFMA. CFMA will not be responsible to CHAPTER, or to any governmental authority, for the payment or withholding of any foreign, federal, state or local income, unemployment or other employment-related taxes in connection with any payments to CHAPTER contemplated by this Agreement.

Unless expressly agreed to in writing by the parties, neither party is authorized to incur any liability, obligation or expense on behalf of the other, to use the other’s monetary credit in conducting any activities under this Agreement, or to represent to any third party that CHAPTER is an agent of CFMA. CHAPTER acknowledges that this Agreement creates no obligation on the part of CFMA to fund the obligations of CHAPTER. CHAPTER acknowledges that it shall remain solely responsible for CHAPTER’S own debts and obligations.

VIII. **Indemnification**

CHAPTER shall indemnify, save and hold harmless CFMA, its subsidiaries, affiliates, related entities, partners, agents, officers, directors, employees, members, shareholders, attorneys, heirs, successors, and assigns, and each of them, from and against any and all claims, actions, suits, demands, losses, damages, judgments, settlements, costs and expenses (including reasonable attorneys’ fees and expenses), and liabilities of every kind and character whatsoever (a "Claim"), which may arise by reason of any act or omission by CHAPTER or any of its subsidiaries, affiliates, related entities, partners, officers, directors, employees, members, shareholders or agents. CHAPTER shall promptly notify CFMA upon receipt of any Claim and shall grant to CFMA the sole conduct of the defense to any Claim.

CFMA shall indemnify, save and hold harmless CHAPTER, its subsidiaries, affiliates, related entities, partners, agents, officers, directors, employees, members, shareholders, attorneys, heirs, successors, and assigns, and each of them, from and against any and all claims, actions, suits, demands, losses, damages, judgments, settlements, costs and expenses (including reasonable attorneys’ fees and expenses), and liabilities of every kind and character whatsoever (a "Claim"), which may arise by reason of any act or omission by CFMA or any of its subsidiaries, affiliates, related entities, partners, officers, directors, employees, members, shareholders or agents. CFMA shall promptly notify CHAPTER upon receipt of any Claim and shall grant to CHAPTER the sole conduct of the defense to any Claim.

The provisions of this Section shall survive any revocation, surrender or other termination of this Agreement.

IX. **Revocation or Surrender of Charter**

A. **Revocation of Charter.** The charter granted by CFMA to CHAPTER hereunder shall remain in full force and effect unless and until revoked by CFMA or surrendered by CHAPTER in accordance with the provisions of this Agreement. CFMA, through its Executive Committee, shall have the authority to revoke or suspend the charter of CHAPTER if the Executive Committee reasonably determines that the conduct of CHAPTER is in material breach of any provision of this Agreement.

B. **Surrender of Charter.** CHAPTER may surrender its charter by delivering to CFMA written notice of its intention to do so no less than sixty (60) days prior to the effective date of such surrender.
X. **Dissolution of CHAPTER**

CHAPTER cannot dissolve itself without:
- A majority approval from a full membership vote;
- A three-month notice to the full membership after such an approval;
- Contacting CFMA Headquarters at least 30 days prior to the membership notice.

Should CHAPTER elect to discontinue operations or dissolve, CHAPTER Bylaws guide the disbursements of monies and assets to be applied by its Board of Directors. If CHAPTER Bylaws do not include information on dissolution of the CHAPTER, funds and assets are sent to CFMA Headquarters after payment of all obligations of the CHAPTER.

XI. **Miscellaneous**

A. **Entire Agreement.** This Agreement supersedes and replaces all prior understandings, whether oral or written, and except as otherwise provided herein, can only be amended by means of a written amendment signed by both parties.

B. **Warranties.** Each party covenants, warrants and represents that it shall comply with all laws, regulations and other legal standards applicable to this Agreement, and that it shall exercise due care and act in good faith at all times in performance of its obligations under this Agreement. Each party further warrants and represents that it is incorporated as a nonprofit corporation in good standing, that it shall remain in good standing, and is and shall remain exempt from federal income tax under Section 501(c)(6) of the Internal Revenue Code, pursuant to the group exemption determination letter issued to CFMA by the Internal Revenue Service. The provisions of this Section shall survive any revocation, surrender or other termination of this Agreement.

C. **Assignment.** This Agreement may not be assigned, or the rights granted hereunder transferred or sub-licensed, by either party without the express prior written consent of the other party.

D. **Governing Law.** This Agreement will be governed by, and the rights and liabilities of the parties will be determined, solely in accordance with the laws of the State of New Jersey, United States of America, except for its conflict-of-laws principles. Any legal action taken or to be taken by either party regarding this Agreement or the rights and liabilities of parties under this Agreement will be brought only before a court of competent jurisdiction located within the State of New Jersey, United States of America. Each party hereby submits to the jurisdiction of the courts located within the State of New Jersey, United States of America, in relation to any dispute arising from or in connection with this Agreement.

E. **Waiver.** The failure of either party to enforce strictly and promptly any of the provisions of this Agreement shall not operate as a waiver of such party’s rights to enforce such provision at a later time or to revoke a charter based upon such material breach of this Agreement.
Robert's Rules provides for constructive and democratic meetings, to help, not hinder, the business of the Committee/Task Force. Under no circumstances should "undue strictness" be allowed to intimidate members or limit full participation. The fundamental right of deliberative assemblies requires all questions to be thoroughly discussed before taking action! The Committee/Task Force rules - they have the final say on everything! Silence means consent!

- Obtain the floor (the right to speak) by being recognized by the Chair.
- Debate cannot begin until the Chair has stated the motion or resolution and asked "are you ready for the question?" If no one responds, the Chair calls for the vote!
- Before the motion is stated by the Chair, members may suggest modification of the motion. The mover can modify as he pleases, or even withdraw the motion without consent of the seconder. If the mover modifies, the seconder can withdraw the second.
- The "immediately pending question" is the last question stated by the Chair.
- The member moving the "immediately pending question" is entitled to preference to the floor.
- No member can speak twice to the same issue until everyone else wishing to speak has spoken to it once.
- All remarks must be directed to the Chair. Remarks must be courteous and should never allude to others by name or to motives.
- The agenda and all committee reports are merely recommendations.

Motions
A motion is a proposal that the entire Committee/Task Force take action on. Individual members can:

1. Call to order.
2. Second motions.
3. Debate motions.
4. Vote on motions.

There are four basic types of motions:

1. Main Motions: The purpose of a main motion is to introduce items to the Committee/Task Force for their consideration. They cannot be made when any other motion is on the floor, and yield to privileged, subsidiary, and incidental motions.
2. Subsidiary Motions: Their purpose is to change or affect how a main motion is handled, and is voted on before a main motion.
3. Privileged Motions: Their purpose is to bring up items that are urgent about special or important matters unrelated to pending business.
4. Incidental Motions: Their purpose is to provide a means of questioning procedure concerning other motions and must be considered before the other motion.

How Are Motions Presented?

1. Obtain the floor.
   a. Wait until the last speaker has finished.
   b. Address the Chairman by saying, "Mr./Ms. Chairman."
   c. Wait until the Chairman recognizes you.
2. Make your motion.
   a. Always state a motion affirmatively. Say, "I move that we ..." rather than, "I move that we do not ...".
   b. Avoid personalities and stay on your subject.
3. Wait for someone to second your motion.
4. Another member will second your motion or the Chairman will call for a second.
5. If there is no second to your motion, it is lost.
6. The Chairman states your motion.
   a. The Chairman will say, "It has been moved and seconded that we ..." thus placing your motion before the Committee/Task Force for consideration and action.
b. The Committee/Task Force then either debates your motion, or may move directly to a vote.

c. Once your motion is presented to the Committee/Task Force by the Chairman it becomes “assembly property” and cannot be changed by you without the consent of the Committee/Task Force.

7. Expand on your motion.
   a. The time for you to speak in favor of your motion is at this point in time, rather than at the time you present it.
   b. The mover is always allowed to speak first.
   c. All comments and debate must be directed to the Chairman.
   d. Keep to the time limit for speaking that has been established.
   e. The mover may speak again only after other speakers are finished, unless called upon by the Chairman.

8. Putting the Question to the Committee/Task Force
   a. The Chairman asks, “Are you ready to vote on the question?”
   b. If there is no more discussion, a vote is taken.

Parliamentary procedure is the best way to get things done at your meetings. But, it will only work if you use it properly.
1. Allow motions that are in order.
2. Have members obtain the floor properly.
3. Speak clearly and concisely.
4. Obey the rules of debate.

Most importantly, BE COURTEOUS!
# ROBERTS RULES CHEAT SHEET

<table>
<thead>
<tr>
<th>To:</th>
<th>You say:</th>
<th>Interrupt Speaker</th>
<th>Second Needed</th>
<th>Debatable</th>
<th>Amendable</th>
<th>Vote Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjourn</td>
<td>&quot;I move that we adjourn&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>Recess</td>
<td>&quot;I move that we recess until…&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>Complain about noise, room temp., etc.</td>
<td>&quot;Point of privilege&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Chair Decides</td>
</tr>
<tr>
<td>Suspend further consideration of something</td>
<td>&quot;I move that we table it&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>End debate</td>
<td>&quot;I move the previous question&quot;</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>Postpone consideration of something</td>
<td>&quot;I move we postpone this matter until…&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>Amend a motion</td>
<td>&quot;I move that this motion be amended by…&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>Introduce business (a primary motion)</td>
<td>&quot;I move that…&quot;</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
</tbody>
</table>

The above listed motions and points are listed in established order of precedence. When any one of them is pending, you may not introduce another that is listed below, but you may introduce another that is listed above it.

<table>
<thead>
<tr>
<th>To:</th>
<th>You say:</th>
<th>Interrupt Speaker</th>
<th>Second Needed</th>
<th>Debatable</th>
<th>Amendable</th>
<th>Vote Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object to procedure or personal affront</td>
<td>&quot;Point of order&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Chair decides</td>
</tr>
<tr>
<td>Request information</td>
<td>&quot;Point of information&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>Ask for vote by actual count to verify voice vote</td>
<td>&quot;I call for a division of the house&quot;</td>
<td>Must be done before new motion</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None unless someone objects</td>
</tr>
<tr>
<td>Object to considering some undiplomatic or improper matter</td>
<td>&quot;I object to consideration of this question&quot;</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>Take up matter previously tabled</td>
<td>&quot;I move we take from the table…”</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>Reconsider something already disposed of</td>
<td>&quot;I move we now (or later) reconsider our action relative to…”</td>
<td>Yes</td>
<td>Yes</td>
<td>Only if original motion was debatable</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>Consider something out of its scheduled order</td>
<td>&quot;I move we suspend the rules and consider…”</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>Vote on a ruling by the Chair</td>
<td>&quot;I appeal the Chair’s decision&quot;</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Majority</td>
</tr>
</tbody>
</table>

The motions, points and proposals listed above have no established order of preference; any of them may be introduced at any time except when meeting is considering one of the top three matters listed from the first chart (Motion to Adjourn, Recess or Point of Privilege).
2019-20 STAR Program Summary

A 2019 Annual Chapter Affiliation Agreement (CAA) Affirmation must be submitted to CFMA Headquarters for a chapter to be eligible for the $3,000 per chapter subsidy.

During the 2019-20 fiscal year (4/1/19-3/31/20), each chapter has $3,000 in STAR Program funds which may be used toward the following:

1. **Chapter Administrative Services expenses**
2. **Chapter Marketing expenses** - tradeshows, brochures, ads, promotional materials, etc.
3. **Chapter Educational Program expenses** – Suicide Prevention Summit, Education Day or educational event longer than a regular chapter meeting offering more CPE than a chapter meeting - instructor, facility, workbooks, etc.
4. **CFMA Speaker Program and CFMA Education Program expenses** - speaker/instructor fee, workbooks*, facility, food & beverage, etc.
5. **Chapter Strategic Planning expenses** - facilitator, facility, food & beverage, etc.

*To use the STAR Program funds for CFMA Education Programs, the cost of workbooks will be deducted directly from your chapter’s STAR Program available balance with no upfront payment required from the chapter.

STAR Program funds will be a reimbursement of the chapter’s expenses. To receive your reimbursement, the chapter must send CFMA HQ a completed reimbursement form and a copy of a paid invoice/receipt (via email to chapsubsidy@cfma.org or fax to 609-452-0474). If it is unclear whether an expenses will qualify, please reach out to CFMA HQ before the chapter incurs the expense in case it does not qualify.

Payments to chapters from the subsidy program will be made quarterly via ACH transfer from CFMA HQ. The payment schedule is as follows:

- Invoices received between April 1 and June 30 will be paid in July
- Invoices received between July 1 and September 30 will be paid in October
- Invoices received between October 1 and December 31 will be paid in January
- Invoices received between January 1 and March 31 will be paid in April

For more information about the STAR Program, see our complete list of FAQs online or contact Chapter Services Coordinator Farah Iaia (609-945-2420; fiaia@cfma.org).
STAR Program FAQs

What is the STAR Program?
The STAR (Support Training And Resources) Program was created to provide value to CFMA chapters and their members via a $3,000 annual subsidy which may be used toward the following items for 2019-20:

1. Chapter Administrative Services expenses
2. Chapter Marketing expenses (tradeshow expenses, brochures, ads, promotional materials, etc.)
3. Chapter Educational Program expenses – i.e., Suicide Prevention Summit, Education Day or educational event longer than a regular chapter meeting and offering more CPE than a chapter meeting (instructor, facility, workbooks, etc.)
4. CFMA Speaker Program and CFMA Education Programs (speaker/instructor fee, workbooks, facility, food & beverage, etc.)
5. All Chapter Strategic Planning expenses (facilitator, facility, food & beverage, etc.)

Why did CFMA create the STAR Program?
We believe the strength of CFMA is enhanced by vibrant chapters that provide excellent value to their members. This subsidy will provide additional resources to help chapters enhance their operations and offerings. The financial success that CFMA has experienced over the past few years provided the opportunity to continue this program for the 2019-20 fiscal year.

The STAR Program is an annual subsidy, will the program continue past the 2019-20 year?
Chapters often plan expenses well in advance so in 2017 CFMA’s Executive Committee committed to approve funds for the Program for the current year plus 2 years. The continuation of the Program is based on CFMA’s financial outlook each year so if it were determined that the Program would be discontinued there are funds set aside for 2 additional years. This gives chapters with recurring expenses such as a chapter administrator 2 years to plan for alternative funding.

What are the requirements to be eligible for the STAR Program?
Chapters must submit a completed 2019 Annual Chapter Affiliation Agreement (CAA) and 2018-19 chapter benchmarking data before becoming eligible to use the subsidy. A complete CAA includes the agreement signed by the Chapter President, an up-to-date balance sheet and proof of the chapter’s most recent tax filing. The CAA can be found on the Chapter Admin Tools page of the CFMA website. Chapter benchmarking information must be submitted each year. If your chapter has not submitted 2018-19 data it can be submitted on the Chapter Benchmarking and Awards page of the CFMA website.

How much is provided per chapter in the STAR Program?
Each chapter who complies with the eligibility requirements will be entitled to receive $3,000 in funding for the current fiscal year (4/1/19-3/31/20). All expenses reimbursed under the 2019-20 STAR Program must be incurred during the current fiscal year.

Why are chapters given a choice of ways to use STAR funds?
The original intent of the STAR Program was to provide funds for chapter administrators, however, we took into consideration the fact that some of our chapters may choose not to hire a chapter administrator. These modified elements of the STAR Program offer valuable options which will allow every chapter to take advantage of the Program while adding value and strength to the member experience. Nonetheless, we still believe the first and best use of the funds is for funding chapter administrative services.
STAR Program FAQs

Why doesn’t the amount of the Program funds available to chapters vary by the size of the chapter?
While a by-size chapter funding structure was considered, we felt $3,000 is a fair, equitable and beneficial funding amount to all chapters. It was determined by the Officers, Finance and Executive Committees that this approach was the appropriate decision under the circumstances.

My chapter is not interested in using the funds for any of these items. Can we use the $3,000 for something else?
No, STAR Program funds can be used ONLY toward the 5 items specified as part of the Program. The CFMA Executive Committee feels these five items cover a viable range of options that every chapter may avail themselves of, and believes these uses will increase the chapter’s effectiveness. If there are items you feel should be added to the STAR Program for future years please contact Cathy Wasner to share your suggestions.

How does a chapter get reimbursed under the STAR Program?
After the expense has been incurred, submit a copy of a paid invoice with the STAR Program Reimbursement Form approved by the Chapter President via e-mail to chapsubsidy@cfma.org or fax to 609-452-0474. The STAR Program Reimbursement Form can be found on the STAR Program page of the CFMA website.

Why does a chapter need an administrator?
Chapter leaders consistently share with CFMA Headquarters their challenges around the administrative tasks involved in running a chapter. Chapters currently using a paid chapter administrator consistently see the benefits of an increased level of efficiency, effectiveness and professionalism of the chapter. The chapter administrator serves as a centralized resource for the chapter; coordinates event management and marketing; keeps the chapter’s website updated; provides CPE compliance and certificates; ensures consistent communications; and many other duties. In summary, a chapter administrator allows a chapter board to focus on strategic issues and leaves the operational issues to the administrator.

Does CFMA have resources for finding a chapter administrator?
Yes. CFMA HQ has a sample RFP, contract, and list of potential duties for a chapter administrator. Each of these can be customized to fit the specific needs of the Chapter and are available on the STAR Program page of the CFMA website.

Do Facebook ads qualify as a marketing expense?
Yes. After the expense has been incurred, submit a copy of the email confirmation from Facebook as your paid invoice.

What qualifies as a reimbursable Educational Program expense?
Educational Programs are programs offering CPE which are longer than a chapter meeting and offer more CPE than a chapter meeting. Examples of Educational Programs which can be reimbursed under the STAR Program are Suicide Prevention Summits and a Chapter Education Day. Many chapters offer CPE for regular chapter meetings, expenses related to a chapter meeting offering CPE are not reimbursable.

How can the STAR Program funds be used for CFMA Education Program resources?
When placing an order for education course materials indicate on the request form that you plan to utilize the STAR Program for partial or complete payment. Once the course is complete, you will have the option to
allocate STAR Program funds to the balance of the invoice you receive. It is a requirement that the Chapter President MUST verify the chapter has agreed to use STAR Program funds for education either via e-mail or on the invoice. No up-front payment will be required with the order; the cost of the materials will be deducted from the chapter’s available STAR Program funds balance and any remaining balance due will be billed.

**Are expenses other than course materials for CFMA Education Programs reimbursable?**
Yes they are. Workbooks ordered through CFMA will be deducted directly from your STAR Program balance. Additional expenses such as, instructor, room charges, food & beverage, etc. can be submitted for reimbursement. Invoices/receipts should be attached to a signed STAR Program reimbursement form.

**Can STAR Program funds be used in support of a Regional Conference that our chapter participates in?**
No. STAR Program funds may not be used toward expenses related to Regional Conferences. Regional Conference support is funded through the CFMA Principal Partner Program (PPP), with each Regional Conference eligible to receive a total of $6,000 in sponsorship by allowing and acknowledging the participation of our principal partners, Viewpoint and BKD, LLP. The STAR Program was developed to provide support directly to individual chapters through activities which help deliver member value. Contact Farah Iaia for additional details on PPP support for Regional Conferences.

**Can my chapter use only part of the funds for a particular purpose (for example: Can the chapter allocate $1,000 toward education, $1,000 toward strategic planning, and $1,000 toward an administrator)?**
Yes, the Chapter President may allocate funds across any items that are part of the STAR Program. On the STAR Program reimbursement form a total for each item should be indicated.

**Will CFMA Headquarters still provide chapters with strategic planning facilitation free of charge?**
Yes. Contact Cathy Wasner (609-945-2432 or cwasner@cfma.org) to schedule your HQ-facilitated session.

**Does my chapter need to hold off on submitting for reimbursement until the total reimbursement is $3,000?**
No, the chapter can submit for reimbursement for expenses quarterly. A chapter may submit for reimbursement of some funds each quarter, there is no need to wait until the expenses total $3,000.

**Once my chapter has submitted for reimbursement, how long will it take to receive STAR Program funds?**
Funds will be sent to chapters via their quarterly ACH transfer. The payment schedule is below:
- Approved reimbursement requests received between 4/1 and 6/30 will be paid in July
- Approved reimbursement requests received between 7/1 and 9/30 will be paid in October
- Approved reimbursement requests received between 10/1 and 12/31 will be paid in January
- Approved reimbursement requests received between 1/1 and 3/31 will be paid in April

An e-mail will be sent to the Chapter President and Chapter Treasurer when the transfer has been made.
Each chapter is eligible for $3,000 in STAR Program funds. A completed 2019 Chapter Affiliation Agreement and 2018-19 Chapter Benchmarking Data are required before the chapter can receive a reimbursement. A chapter does not need to accumulate expenses of $3,000 to submit for reimbursement, reimbursement requests can be submitted quarterly for a portion of your STAR Program funds.

Reimbursements can be requested for the following:
1. Chapter Administrative Services expenses
2. Chapter Marketing expenses
3. Chapter Educational Program expenses
4. CFMA Speaker Program and CFMA Education Programs
5. Chapter Strategic Planning expenses

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<th>STAR Program Item</th>
<th>Amount Requested</th>
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<tbody>
<tr>
<td>Administrative Services</td>
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<td>Marketing</td>
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<td><strong>TOTAL REIMBURSEMENT REQUESTED</strong></td>
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CHAPTER NAME:
Chapter President Name (please print):
Chapter President Signature:
Date:

A copy of paid invoices/receipts must accompany this form for all approved reimbursements. Completed forms should be sent to chapsubsidy@cfma.org or faxed to 609-452-0474.

Payment via ACH to the chapter on approved requests will occur based on the following schedule:
CFMA’s Education Resources for Chapters & Regional Conferences

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

Chapter CPE Credit Guidance
CFMA can guide your Chapter through the steps to successfully issue CPE credits for your local education programming. For more info contact Sue Madden at smadden@cfma.org.

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

Social Learning Programs for Chapters
CFMA’s Social Learning programs offer facilitated online education in a social setting providing desirable content for CPE credit at your convenience. (STAR Program Fund Eligible.)

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

FOR MORE INFORMATION CONTACT
Education Department • 609-452-8000 • education@cfma.org
2019-20
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/who-we-are/
To secure Anirban Basu, e-mail jcomer@sagepolicy.com or call 410-522-7243.

CFMA Discounted Presentation Fee:
$3,400-$3,600 + Travel Expenses

James Benham, CEO and co-founder of JBKnowledge, is a highly regarded entrepreneur, consultant and technologist in the construction and insurance industries. With extensive experience in the design and development of innovative technology to streamline 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:

- Building a Mad Scientist: Driving New Innovation at Old Companies
- Lock-It or Lose-It: Why Every Company Should Be Concerned About Data Security
- The Future is Now: How Today’s Tech is Disrupting the World’s Oldest Industry
- Drones Above: How Commercial Drones Are Changing the Game for Construction

Year after year, James speaks at national and international construction industry events including CONEXPO, CFMA Annual Conference & Exhibition, AGCIT Forum, AGC Annual Convention, CONSTRUCT, CMAA, Construct Canada, Autodesk University and MCAA Annual Convention.

James was recognized among ENR Texas & Louisiana’s 2014 Top 20 Under 40 for his advancements in construction technology.

For more information about James, and to listen to their weekly podcast, visit jbknowledge.com/thecontechcrew.
To secure James to speak, contact liz@jbknowledge.com.

CFMA Discounted Presentation Fee:
James $3,900 + Travel Expenses

Charlie Kimmel, is the President & Chief Executive Officer of Kimmel & Associates - recognized by Forbes as one of “America’s Best Management Consultant Firms” (2016, April). Charlie has dedicated his 25+ year career to executive search. He graduated with honors earning a bachelor’s degree from the University of North Carolina – Asheville.

Charlie leads Kimmel & Associates with a focus on setting and enabling the highest levels of professional standards and client service – all with the aim of delivering outstanding results for clients. He has a true passion for the industry, and feels building relationships with clients through trust and integrity are key.

Charlie has lectured and delivered his unique perspective at national industry events including CFMA Annual Conference, CMAA, CONEXPO, and WasteExpo.

- TOPIC 1: Staff Retention in the Construction Industry
- TOPIC 2: Hiring the Right People: Look Beyond the Resume
- TOPIC 3: Coping with an Aging Workforce
- TOPIC 4: Integrating and Engaging Millennials in the Workforce

For more information about Charles, visit https://kimmel.com/
To secure Charlie Kimmel to speak, contact Alan Kerschen at alan@kimmel.com

CFMA Discounted Presentation Fee:
$3,000 + Travel Expenses

Sally Spencer-Thomas is a clinical psychologist, inspirational international speaker and an impact entrepreneur. Dr. Spencer-Thomas was moved to work in suicide prevention after her younger brother, a Denver entrepreneur, died of suicide after a difficult battle with bipolar condition. Known nationally and internationally as an innovator in social change, Spencer-Thomas has helped start up multiple large-scale, gap filling efforts in mental health including the award-winning campaign Man Therapy and the nation’s first initiative for suicide prevention in the workplace. In 2016 she was an invited speaker at the White House. In her recent TEDx Talk she shares her goal to elevate the conversation and make suicide prevention a health and safety priority in our schools, workplaces and communities. Today, she speaks internationally on the topic of suicide prevention in construction and has keynoted a several CFMA Suicide Prevention Summits.

- TOPIC: Mental Health Promotion & Suicide Prevention: Breaking the Silence & Create a Caring Culture

Connect with Sally at www.SallySpencerThomas.com
To secure Sally, e-mail SallySpencerThomas@gmail.com or call 720-244-6535.

CFMA Discounted Presentation Fee:
$3,500 Expenses Included

Regional Conference Reimbursement
Regional Conferences securing any of the 2018-19 Select Speakers qualify for a $500 reimbursement.

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

FOR MORE INFORMATION CONTACT
Education Department • 609-452-8000 • education@cfma.org
### 2019-20
**CHAPTER Classroom Courses**

*All prices are per attendee/per book. CPE Courses Available.*

<table>
<thead>
<tr>
<th>Course Description</th>
<th>Half-day</th>
<th>Chapter Rate</th>
<th>Regional Conference Rate</th>
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<tbody>
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<td>A 360° View of Your WIP</td>
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<td>Financial Management Essentials for a Non-Financial Managers and Construction Project Leaders</td>
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**STAR Program Info**
Chapters can use all or part of their $3,000 STAR Program funds towards ANY CFMA education provided at the Chapter level.

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*Chapter Classroom Course
15% Discounted Pricing Provided By: sage

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For more information contact
Education Department • 609-452-8000 • education@cfma.org
CFM CHALLENGE

LEARNING OBJECTIVES

- Evaluate the risks and rewards of various strategic scenarios
- Select, implement, and financially manage various initiatives in a game setting
- Determine ways to overcome obstacles encountered during the course of evaluation
- Communicate risk information to owners and leadership more effectively

THE SET UP
Acting as CEO and CFMs of JB Company, teams collaborate to select and manage various strategic initiatives, while facing changing market conditions and unforeseen situations.

THE OBJECTIVE
Increase JB Company’s Total Enterprise Value.

THE WIN
The team producing the largest Total Enterprise Value!

THE TAKE-AWAYS
Improve collaboration, communication, and decision-making through a uniquely entertaining team building experience.

FOR MORE INFORMATION CONTACT
Elizabeth Lachowicz • 609-945-2435 • elachowicz@cfma.org
<table>
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<td>Wilmington, DE</td>
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<tr>
<td>Northern Indiana</td>
<td>Fort Wayne, IN</td>
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<td>Heart of Texas</td>
<td>Temple, TX</td>
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<td>Inland Empire</td>
<td>Redlands, CA</td>
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<td>Evansville, IN</td>
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<td>Pike's Peak</td>
<td>Colorado Springs, CO</td>
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</tr>
<tr>
<td>Miami-Dade</td>
<td>Miami, FL</td>
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</tr>
<tr>
<td>Region</td>
<td>City, State</td>
<td>Population</td>
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</tr>
<tr>
<td>Central New York</td>
<td>Syracuse, NY</td>
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<tr>
<td>Greater Fresno</td>
<td>Fresno, CA</td>
<td>32</td>
</tr>
<tr>
<td>Alaska's Last Frontier</td>
<td>Anchorage, AK</td>
<td>32</td>
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<tr>
<td>Knoxville</td>
<td>Knoxville, TN</td>
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<td>Bluegrass</td>
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<td>Oplin, MO</td>
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<td>El Paso</td>
<td>El Paso, TX</td>
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<td>Big Sky</td>
<td>Billings, Montana</td>
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<td>Northern Nevada</td>
<td>Reno, NV</td>
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<td>Greater Oregon</td>
<td>Eugene, OR</td>
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<td>Mississippi</td>
<td>Jackson, MS</td>
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<td>Ocean State</td>
<td>Providence, RI</td>
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<tr>
<td>Bluff City</td>
<td>Memphis, TN</td>
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<td>SW Michigan</td>
<td>Kalamazoo, MI</td>
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<tr>
<td>Southern Ontario</td>
<td>Toronto, Ontario</td>
<td>14</td>
</tr>
</tbody>
</table>
Important Dates for Chapter Presidents

- May 2019 – Chapter Connection Program 1st Quarter call
- May 15, 2019 – Spring Creek Registration opens
- May 31, 2019 – 2019 Chapter Affiliation Agreement due
- May 31, 2019 – 2020 Chapter Benchmarking Worksheet available
- June 1-5, 2019 – CFMA’s Annual Conference & Exhibition
- June 1, 2019 – Chapter Summit (8:00am-2:00pm) at CFMA Annual Conference
- June 30, 2019 – 1st Quarter Star Program Reimbursement Submission due
- July/August 2019 – Chapter Connection Program 2nd Quarter call
- September 8, 2019 – Spring Creek registration ends
- September 30, 2019 – 2nd Quarter Star Program Reimbursement Submissions due
- November 1, 2019 – Changes to 2020-21 Chapter Membership Dues due
- November/December 2019 – Chapter Connection Program 3rd Quarter call
- December 31, 2019 – 3rd Quarter Star Program Reimbursement Submissions due
- February 2020 – 2020 Benchmarking Online Survey opens
- March 2020 – Chapter Connection Program 4th Quarter call
- March 31, 2020 – 2019-20 Chapter President’s Survey due
- March 31, 2020 – 2020 Chapter Benchmarking Submissions due
- March 31, 2020 – 2020-21 Chapter Officers/Board Members/Committee Chairs due
- March 31, 2020 – 2020 Chapter Showcases due
- March 31, 2020 – FINAL Star Program Reimbursement Submissions due

Ongoing throughout year – Meeting and Event Notices sent to chapters@cfma.org
CFMA’s Chapter Connection Program  
2019-20

The purpose of the Chapter Connection Program is to connect Chapter Presidents with members of the Executive Committee. This program provides a direct and personalized peer-to-peer relationship with Executive Committee members who can support the chapter’s activities, be an advocate for the chapter, communicate the wealth of knowledge available to the chapter leaders, and offer advice based on experience gained through past chapter leadership and CFMA leadership.

The format of the Chapter Connection Program will be a quarterly call with a group of chapter leaders led by members of the Executive Committee. Ideally the President of each chapter will be on the call but another officer or board member from the chapter should attend if the President is unable. The interaction among chapter leaders provides the opportunity to learn from and ask questions of leaders from other chapters.

**Value to Chapter Presidents:** Chapter Presidents receive a personal touch from their Executive Committee connection who will listen to concerns or challenges, offer another perspective or a solution for the chapter leader to be successful, as well as celebrate chapter successes. Chapter Presidents will also have the opportunity to talk with leaders from other chapters and learn what other chapters are doing. Chapter leaders will more fully understand CFMA’s strategic plan and be kept up to date on resources available from CFMA.

**Value to CFMA:** CFMA benefits from the opportunity to better connect with chapters, build a stronger partnership with them, and understand in a more comprehensive manner what our chapters want and need. The Chapter Connection Program assists CFMA in carrying out its mission and aligns with the strategic plan.
Chapter Summit Agenda

Saturday, June 1, 2019 • Las Vegas, NV

7:30 a.m. – 8:00 a.m. Breakfast
8:00 a.m. – 8:30 a.m. Welcome and Introductions
8:30 a.m. – 10:15 a.m. Chapter Challenges and Opportunities
10:15 a.m. – 10:30 a.m. Break
10:30 a.m. – 11:15 a.m. Chapter Challenges and Opportunities
11:15 a.m. – 11:30 a.m. HQ Educational Opportunities
11:30 a.m. – 12:00 p.m. CFMA HQ Update
12:00 p.m. – 12:30 p.m. Lunch
12:30 p.m. – 2:00 p.m. Open Discussion and Breakouts
2:00 p.m. Adjourn
Accessing Chapter Dues Payment Detail

1. Go to www.cfma.org
2. Log in using your User Name and Password
3. Click on “Membership” tab
4. Click on “My Account” link
5. Click on “Admin Tools” link
6. Click on “Chapter Remittance Report”
7. Input dates for reports you want to access
   - Each time an ACH transfer is initiated to your chapter, the chapter representative we have on file receives an e-mail notification. Included in these future e-mails will be a date your chapter will need to be able to access the correct report.
8. Click on “Run Report”

Only the Chapter President and Chapter Treasurer have access to this information. If additional chapter members need access the Chapter President must submit a request.
Cost-Savings Programs

Connect with these CFMA partners for effective, innovative ways to save money and immediately experience the benefit of CFMA membership.

As a fully managed technology firm, Advantix aggregates all aspects of mobile and fixed telecom spend including utilities, invoices, and inventory onto a single platform for ease of management and reporting. Advantix also provides a dedicated telecom account management team including helpdesk and technical support.

As an extension of your IT and finance organization, Advantix will streamline operations and produce significant ongoing cost savings by providing:

- Contract management & negotiations
- Invoice error resolution
- Consolidated billing/bill pay
- Cost center allocation reports
- Comprehensive business intelligence reports with real-time analytics to track performance against budget
Comdata® Corporation is redefining the movement of money and information through innovative payment solutions. The Comdata MasterCard offers a flexible solution that streamlines your spending and lowers your costs with integrated, real-time transaction controls and detailed reporting. Our team of experts will collaborate to ensure cost savings and process efficiencies are achieved.

The Comdata MasterCard® offers real-time control and management of purchases made by employees and subcontractors for your business. Establish controls at the project level or employee level based on your business needs. Specify limits or vendors for fuel purchases and repairs, materials, or per diems and other expenses.

The Comdata Virtual Payment MasterCard for Accounts Payable is an electronic payables solution that streamlines the payment process, turning your accounts payable department into a revenue generator. With the Virtual Payment program, Comdata electronically generates a unique MasterCard account number for every vendor payable, providing an automated alternative to manual check disbursements.

For more than 40 years, Comdata has provided businesses with innovative payment solutions designed to simplify purchasing, travel & entertainment, payroll, and fleet spending. Our electronic payment options will help you reduce costs, streamline the payment process, and improve your cash flow.

Click here for more information on Comdata’s solutions.

Contact: 615-512-2453, Matt Butler, Director of Sales – Construction Comdata, Comdata

CFMA exclusively endorses ConsensusDOCS! ConsensusDOCS are the only standard construction contracts written and endorsed by owners, contractors, subcontractors, designers, and surety professionals. Now for the first time, 22 leading construction organizations agree on a family of fair contracts that advance the project’s best interest. Written in plain English, ConsensusDOCS incorporate best practices to provide a better contractual foundation and reduce costly risk contingencies. As a CFMA member, you are entitled to a 20% discount on all ConsensusDOCS products!

Call CFMA for discount code.

Enterprise Fleet Management is a full-service fleet management company for businesses with mid-sized fleets. With more than 50 fully staffed offices nationwide, it supplies most makes and models of cars, light and medium duty trucks, and service vehicles to businesses across the United States. Enterprise has been recognized with the Automotive Service Excellence (ASE) "Blue Seal of Excellence" award for 14 consecutive years, an industry record. The company's menu of products and services includes acquisition and resale. The firm also helps its customers improve cash flow, lower costs, and expand credit lines.

Contact: 877-23-FLEET, Joseph Stergios, Enterprise Fleet Management
IDShield’s comprehensive identity protection service diligently monitors for signs of criminal or suspicious activity and gives you all you need to keep your identity secure from thieves and fraud.

IDShield protection provides you valuable services from detection to resolution. You’ll feel empowered knowing that, for a small monthly fee, you have the expertise you need to help protect yourself against identity theft and resolve issues related to it. Click here for more information.

CFMA is pleased to offer our members discounted pricing for IDShield (as low as $8.95 /month) and LegalShield (as low as $16.95/month). LegalShield and IDShield are two separate services, and you may choose to subscribe to one or both.

Note: IDShield protection services for individuals and families are available in all 50 states. A one-time, non-refundable enrollment fee of $10 is required with LegalShield services. Subscription is on a month-to-month basis and may be canceled without penalty at any time.

Infintech is an industry-leading provider of credit card and electronic payment acceptance in construction, offering tailor-made solutions, using cutting-edge technologies and equipment, at the best prices. For CFMA members, this partnership can provide accounting and ERP software integration, electronic invoicing, virtual terminals and mobile payments, and ACH/EFT processing solutions that are affordable and secure. www.infintechllc.com/cfma

With LegalShield, you have access to a variety of legal services including: advice on unlimited personal legal issues, attorney letters written or phone calls made on your behalf, contract and document review, and so much more. There are two discounted plans available: one for individuals and one for family. Click here for more information.

CFMA is pleased to offer our members discounted pricing for IDShield (as low as $8.95 /month) and LegalShield (as low as $16.95/month). LegalShield and IDShield are two separate services, and you may choose to subscribe to one or both.

Note: LegalShield services and pricing vary by state and the same services may not be available in all states. When visiting the website, select your state to see what services are available in your state. LegalShield is currently not available in AK; other states, including MT, MA, NE, ND, AR, and WI will be available in August 2016, and VA in July 2016. A one-time, non-refundable enrollment fee of $10 is required with LegalShield services. Subscription is on a month-to-month basis and may be canceled without penalty at any time.

CFMA has partnered with NPP (a group purchasing organization) to provide our members a portfolio of discounted products and services from such vendors as Verizon Wireless, Staples, Fastenal, and Expedia. There is no charge to work through NPP, and there is no obligation to purchase.

View CFMA Member Savings through National Purchasing Partners

PartnerShip® helps you save on every shipment you send and receive. This program is available to all CFMA members with no obligations and no minimum shipping requirements. Members who enroll in the CFMA Shipping Program save on select FedEx® services.

- Save up to 29%* on select FedEx Express® services
- Save up to 20% on select FedEx Ground® services
- Save up to 10% on select FedEx Home Delivery® services
CFMA members also save on less-than-truckload (LTL) freight shipments arranged through PartnerShip with leading national and regional carriers.

- **Save at least 70%** on LTL freight shipments

Visit [www.PartnerShip.com/78CFMA](http://www.PartnerShip.com/78CFMA) for complete program information and to enroll in the free CFMA Shipping Program. If you have any questions, please call PartnerShip at (800) 599-2902, or email sales@PartnerShip.com.

*Includes a bonus 5% online processing discount. Full details available [here](http://www.cfma.org/membership/content.cfm?ItemNumber=679&navI...).
CFMA LOGO USAGE & GUIDELINES

In order to protect and grow the CFMA brand, we have designed these guidelines for the usage of our distinguishable logo. These guidelines outline how to maintain the integrity of the CFMA brand, specifically related to the use of our logo, which is a registered trademark of the Construction Financial Management Association.

CFMA Chapters and industry partners are encouraged to use the CFMA logo on their websites, brochures, packaging, and elsewhere. You may not use the logo or its likeness as a company logo or for any other commercial purpose without permission from CFMA. Effective October 15, 2014, CFMA Chapter derivative versions of CFMA's logo are prohibited, as they dilute CFMA's brand identity. However, any CFMA Chapter derivative versions of CFMA's logo in existence and usage prior to October 15, 2014 may continue to be used.

CFMA reserves the right in its sole discretion to terminate or modify permission to display the logo, and may request that third parties modify or delete any use of the logo that, in CFMA’s sole judgment, does not comply with these guidelines, or might otherwise impair CFMA’s rights in the logo. CFMA further reserves the right to object to unfair uses or misuses of its trademarks or other violations of applicable law.

Contact Fern Oram, Director Content Marketing & Communications, (foram@cfma.org) with questions on logo usage permissions.

Contact Susan Flood, Director of Art & Design, (sflood@cfma.org) if you have any questions or would like to engage CFMA’s design services related to a CFMA Chapter’s unique branding initiatives.
SPECIFICATIONS
The Construction Financial Management Association (CFMA) logos shown here are designed to be reproduced in the following colors: either black, white, or blue and green. If you are using the image in artwork to be reproduced by a professional vendor (e.g., on a printing press), please provide your vendor with the following information.
Minimum Size for Print:
Print: 0.5” wide x 0.5” high (stand-alone logo)
Screen: 0.5” wide x 0.5” high (stand-alone logo)
Resolution: 300 dpi (except the .gif images)
If scaling is required, please constrain proportions – i.e., scale height and width together – do not skew image.

COLORS
PMS: 281, CMYK: C100 M72 Y0 K32
PMS: 341, CMYK C100 M0 Y67 K29
RGB: Blue R0 G57 B118, Green R0 G128 B97
Web: Blue #013878, Green #007E60

PMS: Black
CMYK: 0.0.0.100
RGB: 0.0.0
Web: 000000

PMS: White
CMYK: 0.0.0.0
RGB: 255.255.255
Web: ffffff

THE REVERSE LOGO
To ensure visibility, the reverse logo must appear on a background with a minimum value of 50% black or its equivalent.
IMPORTANT: DO NOT place the blue/green logo on a red background. This color combination will make the logo appear to vibrate.

REGISTERED TRADEMARK REPRESENTATION
As the CFMA logo holds a registered trademark, note that the logos displayed here accordingly include the ® symbol. Should there arise the need to annotate the CFMA logo’s registered trademark status, please use the following: The CFMA logo is a trademark registered in the US Patent and Trademark Office.
**USAGE & GUIDELINES**

- Always use the original logo artwork.
- It is against policy to rebuild, redraw, recreate, or distort the logo.
- It is against policy to use the logo as a design element – rotated, cropped, etc.
- The logo must be placed on backgrounds that offer sufficient contrast to make it clear and legible.
- If the background is dark, use the reverse white logo.
- If the background is light, use the black or blue/green logo.
- Do not place the logo on busy or textured background or pattern that will diminish legibility.
- CFMA logo should appear at a clear distance from any other logo.

**ON THE WEB**
The logo should be large enough to be clearly legible.

**APPAREL**
The minimum width of the CFMA logo on apparel is 1”.

**CFMA CHAPTER LOGOS**
CFMA Chapters are encouraged to use the CFMA logo on their websites, brochures, packaging, and elsewhere. You may not use the logo or its likeness as a company logo or for any other commercial purpose without permission from CFMA. Effective October 15, 2014, CFMA Chapter derivative versions of CFMA’s logo are prohibited, as they dilute CFMA’s brand identity. However, any CFMA Chapter derivative versions of CFMA’s logo in existence and usage prior to October 15, 2014 may continue to be used.

**CHOOSING WHICH LOGO ORIENTATION TO USE**
Legibility of the CFMA logo is paramount. In most instances, legibility of the logo in either the side text orientation or the bottom text orientation will not be compromised. Space constraints and good judgment will easily dictate usage of either the side text orientation logo or the bottom text orientation logo. Instances when the legibility of the logo will be compromised dictate usage of the stand-alone logo. The preference is to always use either the side text orientation or the bottom text orientation logo and limit usage of the stand-alone logo to instances where legibility is an issue.