

2021 NEW ENGLAND REGIONAL CONFERENCE

SEPTEMBER 8 & 9, 2021

SHERATON PORTSMOUTH HARBORSIDE HOTEL, PORTSMOUTH, NH

AGENDA

TUESDAY, SEPTEMBER 7

6:00 – 8:00 p.m.

Welcome Reception

*Sponsored by the New Hampshire CFMA Chapter
Martingale Wharf, 99 Bow St. Suite W, Portsmouth, NH 0380*

WEDNESDAY, SEPTEMBER 8

8:00 a.m.

Registration/Breakfast

9:00 – 9:50 a.m.

Best Practices in Monthly Job Reviews

Herb Brownnett – Brownnett & Associates, LLC

Consistent and disciplined Monthly Job Reviews are critical to maintaining the profitability of a construction company. This interactive presentation will discuss how the best managed companies conduct this vital process. The importance of a consistent Monthly Job Review process, what items should be reviewed for each job, how to get management buy-in and support.

10:00 – 10:50 a.m.

Dynamic Data: Making Data Work for You and the Jobsite

Erik Kennedy – mJobTime

Data is abundant, but what do we do with it and how do we manage it? This session will focus on identifying the areas of integration with your back end accounting systems and your mobile field operations to achieve a solution both groups will benefit from.

Understand key areas of integration to make better use of your data:

- Gain insight on how to evaluate your digital landscape to gain control and simplify processes
- Learn how Maine Drilling and Blasting adopted the Dynamic Data model and built a solution that works for the back office and the jobsite while addressing their KPI objectives

10:50 – 11:10 a.m.

Mid-Morning Break

11:10 a.m. – 12:00 p.m.

The What, Why, and How of Construction Business Intelligence and Analytics

Brendan Abbott – ATX Advisory Services

The focus of the presentation will be on construction business intelligence and analytics. By utilizing statistical methods and technologies to analyze historical data, your organization can gain new insight and improve strategic decision-making. Caliper is our business intelligence platform that provides instant, clear dashboards detailing your critical information in one place. You'll see how Caliper uses your existing data to drive growth, increase margins and minimize risk in your organization. Understanding the concepts and tools used in Business Intelligence, Why Business Intelligence and analytics are important, How they are being used in construction.

12:00 – 1:00 p.m.

Welcome Remarks and National CFMA Chairman & Lunch

1:00 – 2:00 p.m.

Anirban Basu and the Chamber of Data

Keynote Speaker: Anirban Basu – Sage Policy Group

There is light at the end of the tunnel. Is it coming from an oncoming train? This presentation supplies economic data and analysis juxtaposing the pre-pandemic and pandemic world, and then supplies a forecast for the post-pandemic one. Among the areas of focus are labor markets, financial markets, real estate, construction, consumer spending, business investment, international trade and government finances.

2:15 – 2:45 p.m.

Well-being is a Business Strategy

Vienna Morrill, BerryDunn

This session will discuss why wellness programs aren't effective and why organizations should instead focus on well-being. We will introduce the different dimensions of well-being (physical, mental, social, financial, and career) and provide a basic framework for establishing a culture of well-being. Understand what differentiates well-being from wellness. Explain why well-being is an important business strategy. Identify five dimensions of well-being. Understand how to advance a culture of well-being.

2:45 – 3:00 p.m.

Afternoon Break

3:00 – 4:00 p.m.

How Would You Decide? Be a Juror in a Mock Trial

Asha Echeverria, Kelly Gagluso, Rick Galgusio, Conor Shankman & George Burns – Bernstein Shur

Present a Mock Trial - Similar to our 2018 Presentation to the Maine Section with deliberations and discussion at the end. Attendees can get an idea of how a Trial progresses; the back and forth of the attorneys; direct and cross examinations of a witnesses and how the judge fits into it all. It is also interactive as the audience gets to deliberate and decide and then discuss what they found persuasive.

4:00 – 6:00 p.m.

Oktoberfest

THURSDAY, SEPTEMBER 9

8:00 a.m.

Breakfast

8:45 – 10:15 a.m.

Construction Financial Management Challenge

Interactive game is based on the real-life job responsibilities of a well-rounded Construction Financial Manager.

Moderator: Kathryn Schneider – IFS

10:30 a.m. – 12:00 p.m.

CFO Roundtable

Moderator: David Flynn – B2W Software, Kyle Holmstrom, CFO – Cianbro, Tasha Gardner, CFO – Sargent Corp, Jim Dinardi, CFO – Bond Building Construction, Chris Galbraith, CFO – North Branch Construction

12:00 – 12:30 p.m.

Lunch

SEE OUR SPEAKER BIOS ON THE FOLLOWING PAGE

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SPEAKERS



HERB BROWNETT, CCIFP, *(President of Brownnett & Associates, LLC a construction financial management consulting firm.)* A construction financial professional for more than 30 years, he holds a BS and MBA in Finance/Accounting from Florida State University. A CFMA member since 1988, Herb has served as CFMA Chairman, ICCIFP Chairman, President of the Greater Washington D.C. Chapter, and is currently a member of the Philadelphia Chapter.



ERIK KENNEDY, *(mJobTime)* Erik joined mJobTime in 2019 through the acquisition of the PowerTrack team. Prior to that Erik spent 20+ years with POSDATA where he was on the team that created the PowerTrack solution platform. Erik and his team have been hyper focused on providing mobile applications to the construction market with an emphasis on two crucial success indicators which are ease of use and integration.



DALE THOMAS *(Maine Drilling and Blasting)* In 2011 MD&B brought in Dale Thomas as its IT Director, a specialist who had worked in many industries. Dale is a visionary and entrepreneurial senior leader with 20+ years of providing strategic planning, and solutions for IT infrastructure that integrates business objectives, strengthens the enterprise, and improves productivity.



BRENDAN ABBOTT, *(ATX Advisory Services)* Brendan is a CPA, with an MBA in accounting. He has over 20 years of experience leading accounting and technology service teams and engagements; including software design and implementation, business process reengineering, and integration projects. In addition to his expertise in ERP applications, project management, and business intelligence, he is also an experienced provider of controller and CFO advisory services.



ANIRBAN BASU *(Chairman & CEO of Sage Policy Group, Inc. an economic and policy consulting firm in Baltimore.)* In 2014, Maryland governor Larry Hogan appointed him Chair of the Maryland Economic Development Commission. Anirban also serves as the chief economist to Associated Builders and Contractors and as chief economic adviser to the Construction Financial Management Association. In 2007 and then again in 2016, Dr. Basu was selected by the Daily Record newspaper as one of Maryland's 50 most influential people. The Baltimore Business Journal



VIENNA MORRILL, *(BerryDunn)* An organization's greatest asset is its people. Vienna helps organizations implement strategies for helping employees and stakeholders be their best—both professionally and personally. Vienna combines over a decade of management consulting experience with a deep interest in human potential and well-being to help organizations achieve their business goals.



ASHA ECHEVERRIA, *(Bernstein Shur)* Asha's specialty is dispute resolution involving construction, energy, insurance, and banking claims. In addition to being an attorney, Asha is a licensed professional engineer, with LEED accreditation and years of experience designing and coordinating multi-million dollar projects as a civil engineer with Parsons Brinckerhoff. Her firsthand experience with the ins and outs of construction, and energy projects makes her an especially effective advocate in litigation matters and contract negotiations spanning those fields.



KELLY GAGLIUSO *(Bernstein Shur)* After almost 25 years of representing construction clients, including contractors, sub-trades and material/equipment suppliers, Kelly understands that contractors need quick results with minimal disruption to their ongoing projects. Well-versed in the language of construction, available project delivery methods, construction contracting formats and resolution strategies that are best suited to the needs of construction industry players, Kelly takes pride in prioritizing results over process and fashioning practical, workable solutions to the problems that frequently occur in real-world construction scenarios.



RICK GAGLIUSO *(Bernstein Shur)* From the beginning, Rick's career has focused on business law and litigation, and he brings the same intense focus and forethought to every interaction with his clients. An expert on construction law, Rick has represented contractors and other participants in the construction process in virtually all areas where construction and the law intersect, from contract negotiation and formation through the issues that arise during construction to performance and payment disputes and construction defect claims. His proficiency in



these fields has made him an invaluable asset to business clients throughout New Hampshire—and beyond.

CONOR SHANKMAN *(Bernstein Shur)* With a background as an online instructional designer and educational technologist, Conor possesses a nuanced understanding of modern technology and a penchant for communicating clearly to any kind of audience. His experience and insight come in handy, especially when he's assisting organizations that need litigation support and counsel in data, privacy, and technology integration.



GEORGE BURNS, *(Bernstein Shur)* George has been practicing law for over four decades and focuses on litigating, arbitrating, and mediating business and construction disputes. His trial experience is extensive and multi-faceted, before juries and arbitrators alike throughout New England and New York, including numerous construction and design claims, some involving tens of millions of dollars; products liability and toxic tort cases; and personal injury, tax, antitrust, securities, and partnership disputes.



DAVID FLYNN, *(Executive Vice President and CFO, B2W Software)* David plays a key role in driving B2W Software's strategies while overseeing all aspects of finance, accounting, legal and administrative operations. He has more than 25 years of high-tech financial and operations experience as a senior executive and CFO across firms focused on software, hosting and technology-enabled services. David is a CPA who began his public accounting career at PriceWaterhouse LLP. He is an active member of CFMA nationally, and a founding member of the New Hampshire chapter where he is a board member and most recently served as President.



KATHRYN SCHNEIDER *(IFS)* Kathryn has spent the majority of her career in construction technology and in her current role as Key Account Manager at IFS, she works to empower project teams to deliver successful projects, optimize resource and reduce market erosion through technology alignment. She is a Maine Chapter Board Member and participates in the Programs committee to help deliver education content and member engagement. She is passionate about learning and making it fun.



KYLE HOLMSTROM, CFO *(Cianbro)* Upon graduating from the University of Maine with B.S. and MBA degrees, Kyle spent 15 years with General Electric in progressive financial leadership positions in various businesses having been located throughout the country and overseas. He then served as the Vice President of Finance for Sandridge Energy, a publicly traded Oil & Gas Exploration company in Oklahoma City, before finally joining The Cianbro Companies in 2016.



TASHA GARDNER, CFO *(Sargent Corp.)* Tasha breathes life into the workplace. As Vice President and Chief Financial Officer of Sargent Corporation, she values the work and the individuals who make it thrive. The heavy civil contractor with impressive projects throughout New England and the Mid-Atlantic is 100% employee-owned by over 400 skilled workers. Tasha is proud to work with this collaborative team, overseeing finances for the literal movers and shakers of the building world. Prior to joining Sargent, Tasha was a partner at the regional accounting firm BBSC, CPAs for a decade.



JAMES DINARDI, CFO *(Bond Building Construction Inc.)* James has been a construction financial professional for over 20 years and has been the CFO of Bond Building Construction Inc. since 2018. His focus is on aligning people with systems and process to facilitate healthy, profitable, growth, and leveraging data to better understand the path forward. James is a CCIFP, has served as the treasurer of the Massachusetts CFMA chapter for the past 11 years and was a finalist for the Boston Business Journal's CFO of the year awards in 2012.



CHRIS GALBRAITH, CFO *(North Branch Construction)* Chris began his career at North Branch Construction in 2005 as a carpenter and in 2008 was promoted to the position of Assistant Project Superintendent and Finish Carpentry Crew Supervisor. In 2012 Galbraith became a Project Superintendent. He became a Principal and Vice President in 2014. He currently serves as President on the Board of Directors for the New Hampshire Chapter of the Construction Financial Management Association (CFMA). Chris was named to the CFMA 40 Under 40 List in 2021.