CFMA’S VIRTUAL CONFERENCE
JUNE 22-26, 2020

EARN UP TO 26.5 CPE CREDITS

SPONSORED BY:
CFMA PRINCIPAL PARTNERS
GO TO CONFERENCE.CFMA.ORG
TO LEARN MORE & REGISTER
When I wrote my first Chairman’s message for the 2020 Annual Conference & Exhibition, I touched on the importance of having a strong support system and making time for yourself. As each one of us navigates the uncertainty of this pandemic, that sentiment has never been truer. It is important to not only have people we can turn to, but to also have time to take care of ourselves.

While we are unable to meet in-person in Washington, D.C., we have reimagined this Conference to bring you CFMA’s first-ever Virtual Conference. During this weeklong event, you will learn from industry experts while attending general sessions, breakout sessions, construction technology forums, and roundtable discussions.

I know you are dealing with a lot right now, but I hope you will be able to make time to join us and take advantage of this relevant and timely education.

Sincerely,

Kevin R. Booth, CCIFP
Attendees will be able to watch live presentations and ask the presenters questions, similar to an in-person conference. You will also have the ability to chat in real-time with other attendees, share insights and aha moments, and interact with the speakers to get more value. On-demand access to the sessions will be available approximately three weeks after the Virtual Conference concludes. Having on-demand access means you don’t have to worry about missing information, choosing between sessions, or attending live if something urgent occurs.

**REQUIREMENTS:**

- **Computer** (laptop, desktop, or tablet is recommended)
- **Internet Connection** (a hardwire connection vs Wi-Fi is recommended)
  
  *The internet connection should be able to provide a data download and upload minimum speeds of one Megabit per second (Mbps) or more, and a broadband connection is recommended. Be aware that, at any time during the Virtual Conference, changes in internet connectivity and issues related to local availability and network speed may occur – those events are outside the control of CFMA and its technology provider.*
- **Web Browser** (the most recent version of Mozilla Firefox or Google Chrome is recommended, but almost all browsers are supported)
- **Audio** (computer or phone speakers)
- **Zoom** (access to Zoom via computer, mobile app, or dial-in is required for participation in the roundtable discussions)

**CPE CREDITS**

Attendees will have until September 30, 2020 to watch the recorded on-demand sessions and earn up to 26.5 CPE credits. Please note, roundtable breakout discussions are not being recorded. Therefore they will not be available for on-demand viewing or CPE credit.

In addition, the ICCIFP has granted an extension until July 30, 2020 for annual payments and reporting of 2019-20 CPE activity. For CCIFPs who need to meet their CPE requirements, the CPE credits earned during CFMA’s 2020 Virtual Conference can be applied to the 2019-20 recertification year if needed. Please note, CPE credits entered during this 90-day grace period cannot be applied to new recertification plans.
FULL CONFERENCE REGISTRATION
CFMA Member: $550
Non-Member: $700

DAILY REGISTRATION
(Monday, Tuesday, or Thursday)
CFMA Member: $275
Non-Member: $350

GROUPS DISCOUNTS
Groups from the same company can save on Full Conference Registrations
2-5 attendees SAVE $50 per registrant
6+ attendees SAVE $75 per registrant

NOT A CFMA MEMBER?
When registering for the Virtual Conference, take advantage of JOINING CFMA FOR THE ADDITIONAL RATE OF $150 (A SAVINGS OF OVER $200)

OPTIONAL PACKAGES
Not Included in Full Conference Registration*
HEAVY/HIGHWAY ON-DEMAND PACKAGE
CFMA Members: $99
Non-Members: $129
SPECIALTY TRADE ON-DEMAND PACKAGE
CFMA Members: $99
Non-Members: $129

*Attendees must register for the full conference to purchase one or both of these packages. Each package includes three on-demand sessions. On-demand access to the sessions will be available approximately three weeks after the Virtual Conference concludes.
MONDAY, JUNE 22

10:45 - 11:15 a.m. EDT
WELCOME & OPENING REMARKS
Stuart Binstock & Kevin Booth
President & CEO Stuart Binstock will provide an update on the state of the association. Chairman Kevin Booth will deliver the annual chairman’s speech.

11:15 a.m. - 12:15 p.m. EDT
GENERAL SESSION
Post-Pandemic Construction Tech: Surviving & Thriving When the Rules Are Rewritten
James Benham
When COVID-19 hit, some companies were able to respond quickly and others were caught flat-footed. When paper instantly became a liability and working in person became a problem, the adoption of digital tools was accelerated, and the use of internet of things (IoT) devices to automatically measure density and distance became imperative. In this discussion, we will review the top tools that enabled the entire construction industry to undergo radical digital transformation in record time. We'll also discuss the mindset that enabled some companies to step on the gas while others had to pump on the breaks. We will cover technology topics ranging from prefabrication to a paperless jobsite to IoT and worker tracking.
1 CPE Credit in the Field of Technology

12:30 - 1:30 p.m. EDT
BREAKOUT SESSIONS
Addressing the HR, Legal & Project Impacts of COVID-19 Panel
Julie A. Pace, Robert J. Brewer, and Kory George
This panel will discuss the current and future impact that COVID-19 is having on construction companies, businesses, employees, and the economy. Note: Due to the ever-changing landscape of this issue, CFMA will secure the exact topics and industry experts prior to the session.
1 CPE Credit in the Field of Management Services

Contract Reviews & Negotiations: A Comprehensive Approach
Ron Williams, Wendy Byerley, and Joe England
This session will explore the importance of a comprehensive approach to contract negotiations, including an assessment of operational risks unique to each project. Assessment of operational risks include site conditions and location, project team experience, project schedule, safety concerns, and client relationships. This course will also highlight the importance of engaging key stakeholders (both internal and external) as partners to identify, assess, and mitigate such risks. In this interactive session, attendees will benefit from hearing real-life experiences and examples.
1 CPE Credit in the Field of Business Law

2:15 - 3:30 p.m. EDT
BREAKOUT SESSIONS
Construction Analytics: Leading Change in the Industry
John Killingsworth, Bryce Wisan, and Bruce Orr
As CFMs are equipped to become the change agents for construction companies across the country, this session will present practical uses of analytical tools. It will cover the fundamental process for identifying critical pain points within an organization and how analytics can help resolve issues and find process efficiencies. Diagnostics of each sector of an organization can create positive and necessary changes as companies seek to establish continuity and sustainability through economic changes.
1.5 CPE Credits in the Field of Accounting

Surety Industry Update
David Pesce
This presentation will provide a review of the current state of the surety industry and provide insightful information that contractors can use to improve their surety relationships.
1.5 CPE Credits in the Field of Management Services

3:45 - 4:45 p.m. EDT
BREAKOUT SESSIONS
The Art of Assertive Communication
M.J. Clark
Communication skills are vital to your success as a leader and can be the biggest stumbling blocks you will encounter. This interactive presentation reveals the secrets from the book *Shut Up and Lead: A Communicator’s Guide to Quiet Leadership* to help you interact more assertively and authentically at work and in your personal life. It will outline a three-step assertive communication process, provide little-known listening tips, and share information about how to effectively deal with difficult people.
1 CPE Credit in the Field of Personal Development

The Strategic Side of Cash Flow Forecasting
Steve Coughran
Although a critical component of every business, forecasting cash flow is often ignored as it is painstakingly technical. Instead, leaders rely on the income statement and operating profit to gauge financial performance and health – a dangerous way to manage a business. In this session, we will discuss the practices for integrating strategy and financial management to unlock hidden value through better cash forecasting.
1 CPE Credit in the Field of Management Services

4:45-5:00 p.m. EDT
DAILY WRAP-UP
TUESDAY, JUNE 23

10:45 - 11:00 a.m. EDT
DAILY WELCOME

11:00 a.m. - 12:00 p.m. EDT
BREAKOUT SESSIONS
Who CARES About Tax Reform When You’ve Received a Stimulus! Part I
Kelli Franco and Jim Lundy
Last year all our focus was on the aftermath of the most profound tax law changes since 1986. But now in the wake of the Covid-19 Pandemic, much of Tax Reform has been turned upside down through the CARES Act. Learn the latest in tax stimulus, which is anticipated to continue to change in the coming weeks/months, and how the CARES Act has impacted Tax Reform. Learn from industry experts on what you should be paying close attention to in this ever changing environment.

1 CPE Credit in the Field of Management Services

Talk Like a Leader
Anthony Huey
The old adage, perception is reality, has never been truer than in today’s superficial, hyper-critical, and social media-driven world. Studies increasingly show that perception trumps facts when people make judgments of others. For today’s business leaders, communicating clearly – both interpersonally and organizationally – is often the number one driver in controlling that perception. This session gives executives pragmatic keys to swaying internal and external perception in their favor.

1 CPE Credit in the Field of Personal Development

12:15 - 1:30 p.m. EDT
BREAKOUT SESSIONS
Tax Strategies to Help Survive the Pandemic: Part II
Kelly Franco, Gary Stirbis, Al Clark, Ben Matherly, Victor Sturgis, and Rhonda Huismann
The second half of this two-part session will look at how to maximize the benefits of the Coronavirus, Aid, Relief, and Economic Security Act (CARES) and other often overlooked tax planning opportunities that could help generate substantial cash flow benefits. This timely session will discuss how to take advantage of opportunities as early as the July 15 due date, which is right around the corner.

1.5 CPE Credits in the Field of Taxes

More Connected, More at Risk: Cybersecurity
Cindy Boyle
This session will discuss the myths and realities of cybercrime, how construction organizations are targeted by hackers, what hackers are commonly looking for, and how they profit from it on the dark web. It will share crucial insights, with real-world examples and situations, into what construction companies can do to mitigate risk, fight against cybercrime, and harden the organization to prevent attacks.

1.5 CPE Credits in the Field of Technology

2:15 - 3:30 p.m. EDT
BREAKOUT SESSIONS
Developing Leaders Worth Following: Tomorrow’s Leaders
Vanessa Kiley
Who is next in line for your position? Will that leader not only drive organizational results, but also engender the loyalty and engagement of their teams? Can that be said for every emerging leader in your organization? How confident are you in this assessment? In these ever-tightening labor markets, organizations cannot afford to miss the mark in how they select and develop future leaders.

1.5 CPE Credits in the Field of Management Services

Improving Profitability Throughout the Project Management Life Cycle
Don Swasing and Richard King
Effective project management throughout all phases on the project life cycle is essential to delivering a successful project. This session will focus on best practices that should be utilized by self-performing contractors during all five phases of project management to improve profitability on projects. In particular, the session will explore how construction financial professionals can impact project profitability. Further, it will provide real-life examples of workflows and reports to provide accurate information and timely signals to support the project team.

1.5 CPE Credits in the Field of Accounting

3:30-3:45 p.m. EDT
DAILY WRAP-UP

4:00 - 5:15 p.m. EDT
Contract Conflict Resolution & Roundtable Discussion
Ryan Hiss

Please note: the roundtable discussion will use Zoom. One of the key areas impacted by the current pandemic are construction contracts. The presenter will discuss best practices on how to successfully protect your company by including certain terms in your contract to help recover increased costs or schedule extensions. In addition, the presenter will discuss best practices in preparing well supported claims which will give your company the best opportunity to recoup costs or time lost due to the pandemic. After this 30-minute panel discussion, attendees will have the opportunity to participate in small breakout groups to discuss their experiences and share best practices around this important topic.

1.5 CPE Credits in the Field of Management Services

WEDNESDAY, JUNE 24

10:45 a.m. - 12:00 p.m. EDT
CONSTRUCTION TECHNOLOGY FORUMS

12:15 - 1:30 p.m. EDT
COINS

1:45 - 3:00 p.m. EDT
TECHNOLOGY FORUMS

B2W Software
CMiC

COINS

12:15 - 1:30 p.m. EDT
CONSTRUCTION TECHNOLOGY FORUMS

Explorer
Sage
Viewpoint

1:45 - 3:00 p.m. EDT
CONSTRUCTION TECHNOLOGY FORUM

Acumatica

BREAKOUT SESSION
The Path to Your CCIFP Designation
Veronica Whitehead, Patsy Dunn, and Herb Brownell
What are the benefits of certification? Do you meet the eligibility requirements? What is the best way to prepare? What is required to maintain my certification? The answers to these questions and more will be answered during this session. Learn firsthand from your peers about the certification process and how achieving the industry’s only accredited certification for CFMs enhances your individual career and practice development for CPA firms.

1.5 CPE Credits in the Field of Specialized Knowledge
THURSDAY, JUNE 25
10:45 - 11:00 a.m. EDT
DAILY WELCOME

11:00 a.m. - 12:00 p.m. EDT
BREAKOUT SESSIONS

Business Continuity Planning = Business Survival Strategies
Cal Beyer
9/11. Hurricane Katrina. Flooding. Wildfires. The COVID-19 pandemic. What disruption is the next threat to the vitality and survivability of your business? Without a business continuity plan your business is rolling the dice in a game of chance with severe to catastrophic consequences. CFMs are responsible for ensuring the strategic risk management of their company’s assets.
1 CPE Credit in the Field of Specialized Knowledge

Enterprise Budgeting & Projections
Michael McLin
The advanced enterprise budgeting and forecasting program aims to continue to push CFOs in their sophistication of linking business strategy to budgeting and forecasting. The program will help participants gain an understanding of the bottom-up approach to budgeting using marginal contributions and return on equity principles. The intent is to establish realistic budgets and evaluate stretch goals using a new lens. Discover best practices in effective communication regarding buy-in of the operations groups once budgets are established. Lastly, evaluate key metrics for monitoring and forecasting cash flow to improve the predictability of cash.
1 CPE Credit in the Field of Accounting

12:45 - 2:00 p.m. EDT
BREAKOUT SESSIONS

Specialty Trade: Combining Labor Cost Control Methods with Technology & Productivity
James Benham
In a radically transformed market, profitability doesn’t come easy. One of the major ways that construction companies can drive a profit at any revenue level is to manage their labor cost and use technology and productivity measurement to drive efficiency and effectiveness. In this talk, we are going to discuss technology tools and processes that can be used and implemented to measure and manage the efficiency and effectiveness of labor to drive more profit to the bottom line of your specialty subcontracting companies.
1.5 CPE Credits in the Field of Technology

Heavy/Highway Economic Update
Anirban Basu
The impact of the ongoing pandemic has varied massively by industry. While some industries have been effectively shuttered, some have been deemed essential. However, even essential status has not been a guarantee of smooth operations. This session will focus on the impacts of the novel coronavirus-induced crisis on heavy/highway contractors. It will also detail what contractors can expect once this public health crisis is over.
1.5 CPE Credits in the Field of Economics

2:15 - 3:45 p.m. EDT
GENERAL SESSION

Return of the Economist: COVID-19 Economic Update
Anirban Basu
COVID-19 has rocked what had appeared to be a nearly invincible economy; one associated with substantial job growth, multi-decade lows in unemployment, sturdy compensation increases, robust retail sales, low inflation, and strong financial market performance. Underneath that strong performance, however, was a set of fragilities that have been exposed by the pandemic. This session speaks to our current economic circumstances, how difficult things are likely to become over the foreseeable future, and the contours of the brisk recovery to come thereafter.
1 CPE Credit in the Field of Economics

4:45-5:00 p.m. EDT
DAILY WRAP-UP

FRIDAY, JUNE 26
10:45 - 11:00 a.m. EDT
DAILY WELCOME

Please note: the CFO Roundtables are recommended for General Members. Roundtable breakout discussions will use Zoom.

CFO Roundtables
Join like-minded peers for thought-provoking virtual roundtable discussions that will follow a brief presentation. The session will conclude with a virtual open forum on other issues currently challenging construction financial professionals of small companies.

11:00 a.m. - 12:30 p.m. EDT
Large-Firm CFO Roundtables
(Over $100 million)
Callie Miller and Sameer Purao
This session is intended for the CFOs/financial management staff of contractors with greater than $100 million in annual revenues and there will be special discussion for contractors with revenues of $500 million and more. The discussions will focus around the impact of the current environment on HR issues and cybersecurity.
1.5 CPE Credits in the Field of Specialized Knowledge

12:30 - 2:00 p.m. EDT
Medium-Firm CFO Roundtables
($25-100 million)
Jesse Palmer
This session is intended for the CFOs/financial management staff of contractors with $25-100 million in annual revenues. The discussions will focus around operations and staffing the current environment.
1.5 CPE Credits in the Field of Specialized Knowledge

2:00 - 3:45 p.m. EDT
Small-Firm CFO Roundtables
($1-25 million)
Robert D. Heuer
This session is intended for the CFOs/financial management staff of contractors with $1-25 million in annual revenues and there will be special discussions around the impact of the current environment on HR issues and cybersecurity.
1.5 CPE Credits in the Field of Specialized Knowledge

2:15 - 3:45 p.m. EDT
GENERAL SESSION

Heavy/Highway Economic Update
Anirban Basu
The impact of the ongoing pandemic has varied massively by industry. While some industries have been effectively shuttered, some have been deemed essential. However, even essential status has not been a guarantee of smooth operations. This session will focus on the impacts of the novel coronavirus-induced crisis on heavy/highway contractors. It will also detail what contractors can expect once this public health crisis is over.
1.5 CPE Credits in the Field of Economics

4:45-5:00 p.m. EDT
DAILY WRAP-UP
HEAVY/HIGHWAY

Heavy/Highway Common Profit Leaks in Equipment Fleet Operations & Stopping Them with Technology
Herb Brownett
Ineffective fleet operations can result in a number of profit leaks. This presentation will expose these leaks and show how current technology can stop them.
1 CPE Credit in the Field of Specialized Knowledge

Heavy/Highway Technology Usage: Where It’s Headed & What Was Hot at CONEXPO-CON/AGG 2020
Sara Feuling
This session will provide a Technology Experience overview, along with a focus on what was presented and discussed at CONEXPO-CON/AGG 2020.
1.5 CPE Credits in the Field of Information Technology

Impacts of COVID-19 & the Future of Federal & State Funding & Programs
David Bauer
Federal funding is the main driver for the number of and dollars available for many heavy/highway contractors, and this session will explain the impact of COVID-19 on that funding.
1.5 CPE Credits in the Field of Specialized Knowledge

SPECIALTY TRADE

Know Your Contracts & Get Paid
Jason Copley and Matthew Gioffre
Contractors often focus on work scope believing that other provisions are difficult to negotiate or are fixed. However, all contracts are subject to some negotiation. Even those that are fixed require attention, especially those that govern the timing of payment, change order requests, additional work directives, monthly releases, claims, delays, and conditions precedent to termination.
1.5 CPE Credits in the Field of Business Law

Identifying & Negotiating Key Contract Clauses in Specialty Trade Subcontracts
Mark Rysberg and Daniel Hatch
The presenters will provide an interactive mock negotiation of a subcontract to identify contract clauses that arise in specialty trade subcontracts as well as to explain negotiation points specific to the same.
1.5 CPE Credits in the Field of Business Law

Mike Heffernan
The sudden halt in the economy caused by COVID-19 will create a much steeper decline of economic output than the 2008 recession. The subcontracting community and insurance providers supporting performance security protection (subcontractor default insurance and surety bonds) may be exposed to significant losses caused by the ramifications COVID-19 is having on contractors and the industry segments they serve. Using historical data, we will share our 2020 Forecast for contractor default and contractor bond claim exposures that will be front of mind for the owners and general contractors.
1 CPE Credits in the Field of Accounting