

2011 Industry Improvement Conference



Sponsored

By MCAA's

Industry

Improvement

Funds

Committee

November 30 – December 2

Longboat Key Club

Longboat Key, Florida

Mechanical Contractors Association

MCAA

of America

2011 Industry Improvement Conference

Introduction

Industry improvement funds support programs for the benefit of all sectors of our industry at costs that are a small fraction of the hourly wage-fringe benefit rate. They allow associations to promote our industry for the benefit of all in an equitable, orderly way.

Program—The Various Roles of Industry Funds

This year's conference format will explore the various roles that industry funds can play within an association. Industry funds are often used as the backbone of association financing. While their purpose is spelled out specifically in the *Industry Funds Operations Guide*, their every day role is sometimes overlooked. Industry funds can be used towards education, communications, research, industry relations, recruiting, safety, and promotion.

This year's program includes:

- **Market Share Studies** – Carey Peters, the new president of the Construction Labor Research Council, will discuss trends in recent market share reports and how you can use them in negotiations. His presentation will also cover trends in recent collective bargaining agreements.
- **Technology in Associations** – Sean McGuire will host this open forum in discussing ways that associations are using new technology to reduce costs, interact with membership, go paperless and digitally back up records.
- **Audit Preparation for Industry Funds** – The IRS is increasing the number of audits performed on non-profit associations. Denise Martinez, an accountant from Shields Blice and Associates in Uniontown, Ohio, will make a presentation on what the IRS is requiring and how to prepare your industry funds for an audit. Ms. Martinez and Aaron Hall will recount their recent experience with an audit of their industry fund.
- **John Mc Nerney** – MCAA Legal Counsel will join the conference to discuss appropriate legal measures for fund administration as well as give a legislative update.
- **Jim Estabrook** – As primary author of the *Industry Funds Operations Guide*, Jim Estabrook is the leading expert on industry funds as well as pension funding. In his presentation this year, Mr. Estabrook will cover fiduciary responsibilities of industry fund representatives and deliver a legal update.
- **Building Industry Partnerships** – Doug Armstrong will talk about ways associations can use industry partnerships to develop education. His presentation will also include ways to use these partnerships to target workforce investment dollars, given out by the government.
- **Successful Uses of Industry Funds** – These open forums will allow groups to share successful experiences with programs developed through their industry funds.
- **Transforming Collective Bargaining into Collective Business Development** – Steve Lamb, MCA of Chicago's Executive Director, will discuss ways that CBA negotiations can transform to a process where contractors and labor collectively look for ways to develop their business and how it relates to programs that are financed through the industry fund.

IIF Committee

Charles Usher, Jr., *Chairman* (Ideal Heating Company, Brookfield, IL)

Doug Armstrong (MCA of Northwest Pennsylvania, Erie, PA)

Aaron Hall (MCA of Akron, Akron, OH)

Alan O'Shea (MCA of New Jersey, Springfield, NJ)

Reed Rickman (Crescent Contracting, Bronx, NY)

Richard Sexson (Total Maintenance, Inc., Bettendorf, IA)

Robert Snyder, Jr. (Binsky & Snyder, Piscataway, NJ)

Sean McGuire (MCAA Staff Liaison, Rockville, MD)

Longboat Key Club Resort

The Longboat Key Club is a beautiful beachfront resort conveniently located on a barrier island in the Gulf of Mexico just off the coast of Sarasota. The resort features elegantly appointed accommodations, most with full kitchens and all with private balconies. Guests enjoy a wide range of recreational activities including golf, tennis, spas, and miles of white sand beach. For additional information, please visit www.longboatkeyclub.com.

Industry Improvement Conference

Tentative Schedule

Wednesday, November 30

Industry Improvement Funds Committee Meeting 5:00 PM – 5:30 PM

Registration and Opening Reception 6:00 PM – 7:30 PM
Pool Deck

Thursday, December 1

Breakfast 7:00 AM – 8:00 AM
John Ringling Room

Welcome and Opening Remarks 8:00 AM – 8:15 AM
• **Charlie Usher**, *Committee Chairman*, Ideal Heating Company

MCAA Introduction and Educational Programs 8:15 AM – 8:30 AM
• **Mark Rogers**, *MCAA President*, West Chester Mechanical

Market Share Studies 8:30 AM – 9:30 AM
• **Carey Peters**
Construction Labor Research Council

Break 9:30 AM – 9:45 AM

Successful Uses of Industry Funds – Part One 9:45 AM – 10:15 AM

Audit Preparation for Industry Funds 10:15 AM – 11:15 AM
• **Denise Martinez**, Shields Blice and Associates
• **Aaron Hall**, MCA of Akron

Legislative and Regulatory Update 11:15 AM – 12:00 PM
John McNerney

Golf

Friday, December 2

Breakfast 7:00 AM – 8:00 AM
John Ringling Room

Industry Fund Fiduciary Responsibilities and Legal Update 8:00 AM – 9:00 AM
• **Jim Estabrook**, Lindabury, McCormick and Estabrook

Building Industry Partnerships 9:00 AM – 9:30 AM
• **Doug Armstrong**, MCA of Northwest Pennsylvania

Break 9:30 AM – 9:45 AM

Technology in Associations 9:45 AM – 10:15 AM
• **Sean McGuire**, MCAA

Transforming Collective Bargaining into Collective Business Development 10:15 AM – 11:15 AM
• **Steve Lamb**, MCA of Chicago

Successful Uses of Industry Funds - Part Two 11:15 AM – 11:45 AM

Closing Remarks 11:45 AM

Golf

Industry Improvement Conference

Longboat Key Club & Resort ■ Longboat Key, Florida

November 30 – December 2, 2011



Attendee Information

Name _____ Badge Name _____
 Spouse/Guest _____ Badge Name _____
 Company Name _____ Title _____
 Street Address _____
 City _____ State _____ Zip _____
 Registrant's E-mail _____ Work Phone _____ Fax _____
 E-mail address to send confirmation of registration: _____

| Registration Type | Fees |
|---|------------------|
| MCAA Member/Association Executive | \$495 |
| Spouse/Guest | \$ 50 |
| Total Due | \$ |
| Golf fees will be billed directly to your hotel room account. Pairings will be made at a later date. Greens fees will be \$82 each day. | |
| Please reserve a tee time for: | |
| Number of players: _____ | Thursday, Dec. 1 |
| Number of players: _____ | Friday, Dec. 2 |

MCAA Cancellation & Refund Policy

MCAA Cancellation & Refund Policy
 If it becomes necessary to cancel your participation in the conference, please send **written** notification to MCAA. You will receive a full registration refund if you cancel by **November 4, 2011**, other refunds will be handled on a case by case basis. Substitutions are always accepted.

Hotel Cancellation & Refund Policy
 Upon MCAA's receipt of your cancellation, MCAA will forward the notification to the hotel. Please note that reservations must be cancelled prior to 14 days of arrival to receive a refund.

Check (payable to MCAA) AMEX MC VISA

Account Number _____ Expiration _____
 Cardholder Name _____ Billing Zip Code _____
 Signature _____

Hotel Registration

| Room Type | Room Rate | King Bed | Two Beds |
|---------------------------|-----------|----------|----------|
| Lagoon View Club Suite | \$265 | | |
| Beachview Club Suite | \$285 | | |
| Beachview 2-Bedroom Suite | \$475 | | |

Arrival Date _____ Departure Date _____
 Total Number of People in Room _____ Sharing Room With _____
 Do you have any special hotel requirements? _____

Please contact MCAA Convention Department at 1-800-556-3653 if you require special accommodations to fully participate in this event.

Rooms at the Group Rate Are Subject to Availability

Reservations are made on a first come, first served, space available basis, upon payment of meeting registration fee. A deposit in the amount of the **two night's** daily rate is necessary to confirm your reservation. The credit card provided below will be used by MCAA to guarantee the room reservation. Cancellations prior to 14 days of arrival may result in forfeiture of deposit. Check in time is 3:00 pm and check-out is 12:00 noon. Rates are subject to taxes equaling 11% plus a resort fee of \$20 per room, per night. Resort fees include use of tennis courts and fitness center, one double lounge with cabana or umbrella per room, parking, bicycles, local and 800# calls and high-speed internet access.

Check (payable to Longboat Key Club) AMEX MC VISA

Account Number _____ Expiration _____
 Cardholder Name _____ Billing Zip Code _____
 Signature _____

Register online at www.mcaa.org/education

If you have questions, please contact the MCAA Meetings Department:

- By phone: (301) 869-5800
- By e-mail: eventregistration@mcaa.org
- By fax: (301) 869-3520
- By mail: Meeting Dept., 1385 Piccard Drive, Rockville, MD 20850

Our business hours are 9:00 am–5:00 pm Eastern Time Monday through Friday.

For Office Use

Auth: _____
 Database: _____
 Hotel: _____