

Welcome to the Industry Improvement Funds Conference

December 1 – 3, 2021



The Resort at Longboat Key Club ~ Longboat Key, Florida
Sponsored by MCAA's Industry Improvement Funds Committee



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. This Conference will cover “All Things Industry Funds”!

Industry Improvement Funds Conference 2021

Wednesday, December 1st

- 8:30am – 12:00pm ELI Committee Meeting – John Ringling East
- 4:30pm – 6:00pm IIF Registration and Opening Reception – Barefoots Lower Pool Deck

Thursday, December 2nd

Breakfast and Meetings will take place in the John Ringling Foyer and Ballroom

- 7:00am – 7:45am Association Executives Only ELI Session
Kevin Dougherty, Sales Academy
- 7:45am – 8:15am Continental Breakfast
- 8:15am – 8:25am Welcome, Opening Remarks and Introduction of Committee
Nick Sapnar (Committee Chair), Sunnyfield Corporation
- 8:25am – 8:45am Welcome and MCAA Update
Armand Kilijian (MCAA President), O'Brien Mechanical, Inc. II
Tim Brink, (CEO) MCAA
- 8:45am – 9:30am JRGF / NEI Update
Mark Rogers (President of the JRGF Board of Trustees), West Chester Mechanical

The MCAA national office has made changes within the National Education Initiative (NEI), featuring a matrix with new presenters and sessions. Mark will cover how MCAA subsidizes the NEI fees for local associations and members as well as the developments of the recently appointed NEI Task Force. Additionally, Mark as President of JRGF (recently renamed as the John R. Gentile Foundation, formerly known as MCERF) will discuss how the Foundation is funded and the strong connection it has with the Career Development Committee and the Student Chapters. He will provide historical data on the funding of the Foundation that is comprised from local associations, contractor members and the Manufacturers & Suppliers.

- 9:30am – 10:30am Dos and Don'ts of Online Training
John Koontz, MCAA
- Highlighting virtual vs. in-person training, benefits of setting up a virtual education studio, how John set up his virtual trainings and an interactive Q&A of best practices from the audience.
- 10:30am – 10:40am Break
- 10:40am – 11:40am Industry Funds Update
Jim Estabrook, Lindabury, McCormick, Estabrook & Cooper
- Covering the basics, while drilling down on current topics that greatly impact your industry funds. Items that continue to be front and center for the industry throughout 2021 is COVID, Collective Bargaining, Mandatory Vaccinations and Marijuana Testing.
- 11:40am Morning Wrap-up
Nick Sapnar, Sunnyfield Corporation
- Afternoon Golf

Friday, December 3rd

Breakfast and Meetings will take place in the John Ringling Foyer and Ballroom

- 7:30am – 8:00am Continental Breakfast
- 8:00am – 8:45am (PART 1) Executive Panel Shares All Things Industry Funds
Jim Estabrook, Lindabury, McCormick, Estabrook & Cooper
AEC Executives - featuring Dick Sawhill, ARCA/MCA; Tom Wanner, MCA/MSCA of
Cleveland, East Central Ohio; and Tony Saporito, MCA/MSCA of New York
Mission statement or purpose statement? How Industry funds gets worked in CBA? Do's and Don'ts? How COVID affected the industry funds? Drug Testing with your industry funds/Cannabis?
- 8:45am – 8:55am Break
- 8:55am – 9:45am (PART 2) Executive Panel Shares All Things Industry Funds
Jim Estabrook, Lindabury, McCormick, Estabrook & Cooper
AEC Executives - featuring John Rayburn, MCA of Chicago; Marty Drobny, MCA of New
Jersey; and Aaron Hall, MCA of Akron
How do you get your industry funds? Collective Bargaining? How are the funds collected? How do the funds come in? Who do you use the funds for?
- 9:45am – 10:45am General Investing Practices & Creating a Sound Investment Policy Statement
Ryan Ketvertis, CRPC, CPFA, Merrill Lynch Wealth Management
Ryan will talk through putting together a strong portfolio for long term appreciation and the importance of diversification, all while complying with a streamlined Investment Policy Statement.
- 10:45am – 11:00am Break
- 11:00am – 11:40am Legislative, Regulatory and PAC Updates
John McNerney, MCAA
As we encourage questions to our MCAA General Counsel, he will address such topics as: How does the local and federal government affect our industry funds? How do we get our money? What we do with it?...and more!
- 11:40am Conference Wrap-up
Nick Sapnar, Sunnyfield Corporation
- Afternoon Golf

THANK YOU !!!

We will see you next year, back again at The Resort at Longboat Key Club in Longboat Key, FL
November 30, 2022 – December 2, 2022