Copper State Ledger

Fall Edition

November, 2010

from the President . . . Kris Roe, McCarthy Building Cos.

Fall is in the air! Finally! I can hardly believe we are already in the 4th quarter of the year. The economy may have slowed, but time surely has not! Looking forward to the remainder of the year often brings a certain degree of anxiety. The Holiday season is just around the corner and so many of us are entering a period of budgeting and business planning for next year and beyond. And before we know it, it will be time to report year end results and work with auditors.

Wow! Thinking of all that surely makes me thankful for the timing of our golf tournament! For those of you who attended I hope you would agree it was a tremendous success!!! Thank you to everyone who worked so hard on the committee!

The spirit of the upcoming season is one of thankfulness and giving. So, before we get wrapped up in the craziness that lies ahead, let’s take some time to focus on doing at least one small thing to help or give back to someone else.

For CFMA, October was membership awareness month. Do you know someone who would benefit from the many offerings of our organization? Take a moment to reach out to a colleague and invite them to our next Chapter lunch.

Know someone who is unemployed or needing to make a career change? Offer to post their resume with our Chapter career services or send it out to your network of professional contacts.

Know someone who is feeling complacent or wanting to advance in our industry? Introduce them to the CCIFP Institute and certification. There is an upcoming exam the beginning of December.

Know someone who is pursuing or wants to pursue a financial career in construction? Provide them information on the scholarships our Valley of the Sun chapter offers each semester for those who are enhancing or completing their collegiate education.

Do you or someone you know want to personally volunteer this Holiday season? Participate with other members of our Chapter in the Christmas Tree project during December. These are just a few examples of the ways in which you can become involved, give back, or do something thoughtful for someone this season.

Our chapter also has many fun events planned in the next few months that can provide a break from the stress the upcoming season may bring. The program committee is hosting a Pub Crawl in November. Instead of our normal December lunch program we will have our Holiday gift exchange. And after the year has ended, and we are through the hustle and bustle, the VOS Chapter will celebrate its 25th Anniversary in February!

So, as the next few months unfold, remember to spread a spirit of thankfulness and giving and along the way take time to give to yourself. I look forward to seeing everyone at our upcoming Chapter events!

Kris

Valley of the Sun Chapter Mission Statement

The Valley of the Sun Chapter of the Construction Financial Management Association (CFMA) is a broad-based organization of professionals committed to serving the construction industry. We are dedicated to member service by providing a forum for the exchange of ideas and a source of educational programs directed to their specific needs. We strive to invest in our community through involvement in industry-related issues and charitable endeavors.

Hey You!

Yes, you! The one quickly glancing over this article trying to determine if this is important enough to acknowledge. Well, let me assure you it is.

On November 11th I will be leading our annual strategic planning meeting with the board members and past presidents, and we need your feedback. Tell me what’s great about our Chapter and what could be improved! What would entice you to participate more and what makes you stay? Why would you recommend CFMA to a peer and why not?

As my father always said, “I don’t know what I don’t know”, and my mom would respond “ignorance is not an excuse”. Don’t let me claim ignorance. Take five minutes right now and email me your thoughts before this newsletter ends up in your delete file.

jbracy@dbsi-inc.com

Hey You!

by Jim Bracy, DBSI Inc.

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**Christmas Tree Project**

**Help Santa Fill His Bag**

Santa is counting on VOS and members’ offices to help him make Christmas happen for the students at Fowler Elementary School. If you’ve participated in the past, you know how much your efforts and donations are appreciated. There are many ways you may help.

1) Bring an unwrapped toy ($5 to $10, no more than $15) to the November 18 lunch
2) Set up a toy drive at your office and donate those items - even a small toy drive goes a long way when combined with others
3) Volunteer to work a two-hour shift on Friday, December 3, between 7:30 a.m. and 1 p.m. at Fowler Elementary, 6707 West Van Buren, Phoenix
4) Make a cash donation - Santa can buy soccer balls and basketballs for $3 each when he orders 100 at a time

If you’d like your toys and donations picked up and delivered to Santa, contact Bob Cummings at 602-221-1662 (office) or 602-717-8329 (cell) or Bob.L.Cummings@Chase.com

Santa thanks you!

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**CCIFP coming in December**

by Marj Weber, Irontree Construction

For those of you who were unable to attend the CCIFP Overview Seminar in October, another Overview is being held on December 1, 2010, in conjunction with the AICPA Construction Industry Conference. The location is the Arizona Grand Resort, and the instructors will be Tony Stagliano, CPA, CCIFP of CBIZ-MHM (one of the authors of the Seminar) and Marj Weber, CCIFP of Irontree Construction, Inc. Be sure to watch your emails and the VOS CFMA website for details. Then on December 4, 2010, the CCIFP Exam will be held at the Arizona Grand Resort. This year, for the first time, AICPA is promoting the CCIFP designation and helping to facilitate the Overview and Exam. This is another example that Certification is maturing and now is the time for you to join the other 705 current CCIFPs.

Any questions please contact Marj Weber at 480-969-9966 or marge@irontree.net.

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**Membership Committee Stirs Things Up**

by Myrna Membrilla, Ledgerwood Assoc.

To recruit new members, the CFMA Valley of the Sun Membership Committee hosted a Fall Mixer. Each committee member invited one CFMA member who in turn invited 1 or 2 potential new members to learn a little more in a fun and relaxed setting about both the professional and personal advantages of joining CFMA. The event was a success, and the committee plans to hold similar events in the future.

The Committee is now spearheading the promotion of LinkedIn for CFMA members. This will be an easily accessible way for members to exchange ideas with others about everything from business practices to upcoming events from their desktop.

Total combined membership at this time is 258.
Read All About It - VOS Successful Golf Tournament!

Just a week earlier the temperatures were not dropping and it looked like we weren’t going to have those balmy temperatures we had been advertising. Lo and behold, the forecast changed, and it appeared we were going to have rain, and lots of it. Despite the threat of storms and a possibility of being rained out, the 20th annual CFMA VOS Golf Classic, presented by CBIZ & Mayer, Hoffman McCann, P.C. delivered. There was a mild shower to keep the game interesting, but the forecast ended up benefiting us as it was a beautiful day for golfing. Just ask the seasoned golfers!

There is a tremendous amount of work that goes into putting on a tournament, and there are a lot of people and companies to thank for their help and support. This was an especially difficult year in the industry as a whole so the thanks are truly heartfelt. We couldn’t have done it without our sponsors and volunteers!

Our Sponsors:

Presenting: CBIZ & Mayer Hoffman McCann, P.C.
Platinum: MJ Insurance and Textura
Gold: Haydon Building Corp, CNA Surety, and Pulice
Mulligan: McCarthy Building Companies

Scorecard: Agate
Beverage Cart: Jokake
Silver: Lovitt & Touché, HACI Mechanical Contractors, Corbins Electric, Comdata, Price Kong & Co., CPAs, Computer Guidance, MGC Contractors, Sundt, Travelers, Wallace, Plese & Dreher

Marketing: Dexter + Chaney, Arizona Office Technologies, Flex-Print, Winning Technologies, Moss Adams


Give-aways: United Healthcare, MetLife

All 129 golfers received a goody bag including a deluxe golf shoe bag and silicone band tumbler, courtesy of our give-away sponsors. Many companies and individuals also made donations for our raffle prizes including SUNS tickets, Cardinals tickets, Coyotes tickets, spa gift certificates, and much much more. Companies and individuals also donated items for the goody bags including golf balls and golf tees.

Several of our marketing at the tee sponsors were very generous in raffling off some very nice prizes as well. These included:

Dexter + Chaney - Kindle won by Carl Politico of Jokake
Arizona Office Technologies - All-in-One Printer, Troy Anderson, Jenco
Moss Adams - $100 Shop Gift Certificate, Ryan Bailey, Irontree Construction
FlexPrint - iPad, Tom Lawless, Pulice Construction

It is the volunteers who brought it all together the day before and the day of the tournament, though, and they deserve our gratitude for their time and energy. They are:


For our 20th tournament, we raised the stakes and offered a chance to win $30,000

continued, page 5
which could be applied
toward a brand new car,
courtesy of Enterprise
Fleet management and
Earnhardt Ford. While no
one won the car this year
on the 8th hole, there was
some excitement on the
9th hole when a player
came very close to having
the second shot be an
“eagle”.

Congratulations to the
winners of the champion-
ship flights.

Winning Flight A with a
score of 58 was Dan El-
lington, Jorge Mendez,
Matt Lundahl, and Jim
Brignall.

Second place (a score-
card playoff) with a score
of 58 went to Ross
Dietrich, Jason Ford,
Tony Kong, and David
Barnett. The third place
team was Kirby Ande-
son, Kurt Louvier, Greg
Beetem, and Wes Smith.

Winning Flight B with a
score of 66 was Joe De-
Vecchio, Andrew Atkin-
son, Troy Anderson, and
Grant Getman.

Second place (with an-
other scorecard playoff) in
the B Flight was George
Sideris, Greg Poulsen,
John Franz, and Linda
Franz. Taking third place
was Eric Newton, Jim
Connell, Heather Mark-
ham, and Teresa Walker.

Winning Flight C with a
score of 71 (scorecard
playoff once again) was
Shane Dryanski, Brian
Saker, David Beer, and
John Verhoff.

Second place team was
John Harvey, Barry Good-
rich, Mike Schmidt, and
Steve Hultett. Third place
was Russ Kimberlin, Brad
Enos, Ryan Evans, and
Sammie Renfrow-Hulm.

Other winners included:
Closest to the pin
(women) – Bonnie Hall
Closest to the pin (men) –
Matt Mooney
Longest drive (women) –
Heather Markham
Longest drive (men) –
Clayton Boop
Longest putt – Mike
Schmidt
Shortest drive – Mike Fitz-
patrick
Over-all Most Honest
Team – Anne Devine
Thul, Mimi Berryman, and
Bonnie Hall

Special thanks to our
committee members who
put in time behind the
scenes months before the
tournament, especially my
co-chairs, Taylor Brock-
bank and Moni LaLonde.

Committee members:
Brad Smith, Elise Thorpe,
Erin Jones, Dave Miller,
John Corcoran, Lacy Ze-
maitis, Lisa Vaglio, Kris
Roe, Marty Garrison,
Michelle Grider, Nancy
Palmer, Tom Lawless,
Paul Boley, and Glenda
Whitten.

As you know, this golf
tournament is our signa-
ture event; and many
chapters around the
country seek feedback
from us on our successful
formula, if you will. We
raise money which is set
aside in a restricted fund
for educational support of
our industry. In the last
two years we have
awarded over $30,000 to
deserving students in
addition to supporting the
ABA apprenticeship pro-
gram and grants for our
own member firms hiring
qualified individuals. We
budgeted a profit of over
$21,000, down some from
prior years. While we did
not break our record from
2008, we did much better
than expected with over
$26,000 raised!

Thanks to all of you for
supporting the VOS’ 20th
Annual Golf Classic.
The 2011 Arizona Construction Executive of the Year Banquet Committee held its inaugural meeting on September 20th to begin planning for next year’s banquet.

Tony Hakes, CBIZ & Mayer Hoffman McCann, joined by Ryan Evans, Metal-Weld Specialties, are the committee co-chairs. On the heels of a very successful event for 2010, where Marcia Veidmark and Joseph P. Schwan were honored as the Arizona Construction Executive of the Year and the Arizona Construction Industry Pioneer Award recipients, Tony and Ryan have their sights set on leading the committee to another evening of celebration honoring the finest in our industry.

Our monthly meeting place and time has not changed, which will continue to be at Gallagher’s on 16th Street and Morten starting at 4:30 pm (during happy hour, of course). Meeting dates will be announced monthly. If you are interested in joining the committee, please contact Tony or Ryan and look for our monthly meeting announcements for dates.

For those of you not familiar with the banquet, it is held annually each spring to recognize the achievements of individuals in the following categories:

- Arizona Construction Executive of the Year
- Arizona Construction Industry Pioneer
- Best Under the Sun Outstanding General Member
- Best Under the Sun Outstanding Associate Member

Many details have yet to be finalized, so stay tuned to find out more. If you would like to be a sponsor, contact one of the co-chairs. Sponsorship levels are below. Please note that we offer an early payment discount of ten percent for payments received by January 31, 2011.

$5,000 Title Sponsor

- Admission for 8 ($1,000 value), presentation of plaque during the banquet in recognition of sponsorship, company featured during banquet presentation, banquet program, and CFMA-Valley of the Sun website.

$2,000 Platinum Sponsorship

- Admission for 4 ($500 value), company featured during banquet presentation, banquet program, and CFMA-Valley of the Sun website.

$1,200 Gold Sponsorship

- Admission for 2 ($250 value), company featured during banquet presentation, banquet program, and CFMA-Valley of the Sun website.

$750 Silver Sponsorship

- Company will be featured on banquet program and CFMA-Valley of the Sun website.

$250 Bronze Sponsorship

- Ticket price for admission to the banquet.

Hope to see you at the banquet next spring!
What’s in It for Me?

Did you know that CFMA offers a multitude of educational opportunities – many of them including continuing education credit?

Being a member of CFMA and VOS offers an entire list of benefits. Some educational forums are presented “live” by the VOS Chapter; others are offered on the web from CFMA national. You choose!

For example, live training ranges from The Basics of Construction Accounting to Cash Management and Contracts 101. See something there of interest? How about classes on Accounting and Reporting, Fundamentals of Ethics, or Project Management.

These courses and more advanced ones can be available through VOS. Which ones are of interest to you? Which ones would you like to have available for others in your organization?

The Education Committee, co-chaired by Marj Weber and Nancy Palmer are interested in what interests you. Contact them with your ideas. Marj: Marge@Irontree.net
Nancy: Nancy.Palmer@Agateinc.com.
Or: CFMA-Admin@cox.net.

Wait – that’s not all! Can’t get away from the office? Give us an hour, and we’ll give you valuable information.

CFMA National offers up to 12 hours of CPE delivered to your computer. Monthly, CFMA’s Knowledge Now webinars focus on various topics. The topics are timely, informative, and relevant to construction financial managers and professionals. As a member, you may access these for Free (yes, we like that word!).

The webinars also are archived so you may view them later or even review them.

For a full schedule of topics, visit www.cfma.org and click on Education in the dark blue bar at the top of the page.

VOS Celebrates its 25th Anniversary by Michelle Grider, Textura Corp.

As many of you may know, our 25th Anniversary as a Chapter of CFMA is fast approaching! As the largest and the BEST chapter, we are planning an outstanding event.

So MARK YOUR CALENDARS NOW for FEBRUARY 17, 2011 for the CELEBRATION.

Plans have been proceeding at a fast pace. The HEARD MUSEUM is the place, and we promise a fun time for all while we honor our history and those that made us what we are today.

This evening gala will celebrate both the past and the future of our amazing organization.

Make the commitment now to attend and be sure to check this newsletter, your emails, and our website for future updates.

If you are interested in being a part of the planning process, please contact Michelle Grider at 480-967-7102 ext. 1 or email her at michelle.grider@textura.corp.com

This evening event will be in place of our regular lunch meeting that day. This is a “date night”, so bring your favorite date with you.

There are sponsorship opportunities available at a very reasonable price. Again, contact Michelle for more information about how your company may sponsor a year!

We’re having a party, and you’re invited!
LinkedIn is the premier business-to-business networking site in the USA. Here in the Valley of the Sun, we’d like to lead CFMA National’s organization with the Best LinkedIn Group Under the Sun! As a consultant helping firms with LinkedIn, Blogging, Twitter, etc., it dawned on me that perhaps some of you aren’t aware of the benefits of real-time shared collaboration (aka social networking) or how the CFMA VOS LinkedIn Group can make your own job a bit easier.

LinkedIn establishes your personal brand and expertise. You can control what appears in your profile. It is sensitive to privacy (unlike what you hear about Facebook), and it can also be beneficial to your firm with a Company Profile. It can signal to owners, suppliers and prospects whether you are progressively embracing technology. Once the economy recovers, it will be paramount to your success in attracting talent. Did you know that LinkedIn just added Career Explorer to help college grads find their career path?

How can you use the CFMA VOS LinkedIn Group? Groups allow you to Start Discussions:
- Share a great article, post a blog or other educational content
- Ask for recommendations on products or service providers
- Post CFMA VOS meeting handouts, PowerPoint, etc. to continue the discussion in more depth (and perhaps have the presenter participate to add more value)
- Add announcements and links to events, press releases, photos (perhaps of the golf tournament or Executive of the Year Banquet)
- Request experience advice (I once had an electrical contractor ask if I knew another electrical contractor that had a recent sales tax audit, and what were auditors “focusing” on this year?)
- Suggest topics and speakers for programs
- Post a Job Position (free) – appears under a separate tab from Discussions
- Post a Promotion (affiliate members) – note this is under a separate tab too

There are many reasons for using groups, but the one I like the most is that it can cut down on the volume of emails in my inbox. When you join the group, you can set it to receive a digest of all content once a week! Perhaps if we get every member to join the group, we can do away with most of the CFMA email blasts! Are you a member of the CFMA VOS LinkedIn Group? Why not?

Still not convinced of the power of LinkedIn? Here are a few articles you’ll find both educational and valuable:
- Google Loves LinkedIn
- How to Optimize Your LinkedIn Profile
- LinkedIn Recommendations: The Service Provider’s Dream
- How to Export Your LinkedIn Contacts

If you have questions or need some help I’m available. carol@hagenbusiness.com
Normally this column is all about everything our Chapter has accomplished since the last issue of the Copper State Ledger. This time I think it is time to report on our 20th Annual VOS CFMA Golf Tournament held on October 20th.

Threatened all week by a major rain storm, I arrived prepared – umbrella and rain poncho in hand as I understood that golf tournaments do not get called for rain (one of many reasons I don’t golf!) and we all know my hair turns to a gluey mess when wet! And though there were a couple of times that the skies opened up, for most of the day the rain was held at bay. My official duty of the day was to take team pictures of all the golfers. As a non-committee member (the only VOS Committee of which I have never been a member* – again the golf “issue”) I have done this several times over the past years – but this will be the first time I have reported on the experience. [*Editor’s Note: That’s exactly why you should co-chair the event – then you don’t have to play!]

The 20th ANNIVERSARY called for this special treatment and no, this report won’t be fair and balanced and names will not be withheld to protect the innocent! I was accompanied by Nancy Palmer, who has disavowed all knowledge of the following report!!

First and foremost – what is it with GUYS? Afraid to touch each other, each male group had to be cajoled to move together (to fit in the picture) and pretend they liked each other! So guys you can ALL congratulate each other on your macho status – well except for one group and they shall remain nameless! The ladies were much more cooperative, anxious to look gorgeous AND friendly – which they did. Let’s hope some of their pictures are included in this issue and on the website.

Now is the time to apologize to Keith Bieber and the HACI group for missing their picture. Explanation – when we came upon this group one of their team members had not arrived, so we promised to return. Unfortunately, we never “found” them again. Keith, bring your teammates, your clubs, and golf outfits to my office, and I will take several shots and post as the first picture(s) on our website – or maybe not… There was also another group we spent most of the day looking for, only to find out they never showed. Could they have missed the rule that golf tournaments don’t get cancelled for rain?

I do love doing this “duty” for the tournament. I enjoy riding around in the golf cart – even if it is cold and sometimes WET! Not to mention getting to see some members and non-members, that only come out to participate in our tournament. During our travels that day we saw…

David “Joey” Beer searching water hazards for his ball and complaining that certain beverages do not facilitate a good golf score. And reports were circulated that Tony Hakes, while searching for his ball in a tree, was hit in the head by that same ball – reports are that he is recovering at home with a small bruise and a larger injury to his ego, caused by hysterical laughing and finger pointing!! We also saw some interesting outfits – I am told that some fashion standards do not apply to the golf course. I did have concern for those that apparently don’t watch the weather reports and showed up in golf shirts and shorts – brrrrrr!! Then there were some golfers very serious about their play – I imagine those are the teams that won – and then those that were there just to have FUN and help contribute to Construction Education, the beneficiary of our 20 years of Golf.

On this same note – I must congratulate the Golf Committee Co-Chairs Lisa Autino, Moni LaLonde, and Taylor Brockbank along with all the Committee members for a job well done. Through their efforts we sold out the tournament (the course was closed to others). And again, special thanks to our presenting sponsor CBIZ & Mayer Hoffman McCann for their continued support of this premier Valley of the Sun CFMA event. So by ALL reports, including mine, our 20th Annual VOS CFMA Golf Tournament was a HUGE success, and I can only hope I will be asked to return to serve as the Official picture taker next year. If so – I will see you there!!

Until next time…….
Spring Creek

Because everyone I knew who attended a Spring Creek retreat was so tight lipped I was only left with speculation and imagination. Was it a reputable institute and incubator for rising CFMA elites or a nefarious secret society where I would be initiated, given a secret name and allowed to see the cherished manuscripts, but only after reciting the oath of secrecy.

I looked at the comments posted on the CFMA website – “It changed my life!” “A life changing experience!”, “You HAVE to go!” - Way too dramatic for me, I don’t want my life changed. I was hoping for a relaxing and educational experience. Well what I got out of the experience was not what I expected but just what I needed.

First and foremost I realized that the ultimate competitive advantage is not finance, not strategy, not technology but teamwork, both because it is so powerful and so rare. To quote a statement from a book I read, “If you could get all the people in an organization rowing in the same direction you could dominate any industry, in any market, against any competition, at any time.”

I also learned that the single most important factor that will determine the success (or failure) of any organization is trust. Trust is the glue that bonds great people and great organizations and ensures long-term success.

Our chapter is full of exceptional leaders, and part of being a good leader is the ability to make others successful. Surprisingly or maybe not, it turns out that no matter how big or how small your chapter is the hurdles you face are the same and the most common obstacle facing chapters is engagement of its members. If an organization becomes dependent on a few people, it risks losing continuity and a group of experienced leaders to call upon.

I want to challenge each and every one of you to not rest on the laurels of the VOS chapter but to unite our efforts to reach even higher goals.
Succession Planning

by Tom Lawless, Pulice Construction

In mid-November the Succession Planning committee will convene to fill the open officer and board positions, as well as committees where replacement chairs, co-chairs, and members are needed.

Are you ready to give back to your Valley of the Sun Chapter? You are what makes this Chapter great.

Opportunities range from once-a-year commitments to ongoing roles where you have an impact.

VOS has the following committees:
- Construction Executive of the Year
- Education
- Golf
- Legislative
- Membership
- Newsletter
- Programs
- Salary Survey
- Scholarship
- Succession Planning

Positions to be filled include Vice President, Secretary, Treasurer, and two Directors.

There are some committee chair positions open as well.

Contact Tom Lawless TLawless@Pulice.com to let him know where you are willing to serve, or if you would like more information on the duties of each position.

You’ll be glad you did.

Some exciting news is coming from down south!

by Bryan Eto, BeachFleischman

Yes, the Arizona Wildcats football team is rocking, rolling and taking names. Heading into the weekend, they are 5-1 and are full steam ahead with momentum on their side. What can be more exciting than that? It can only be CFMA in Tucson. That’s right! The Old Pueblo satellite chapter is back! It started with a successful kick-off event and has been riding the wave of momentum ever since. The new leadership is focused and committed to building the chapter and providing quality and relevant seminars to its members and the construction industry. The next seminar will be December 2 (tentative) after the elections. The featured speaker will be from BeachFleischman P.C., southern Arizona’s largest accounting and advisory firm, giving a tax update, planning tips, and expected changes for 2011. We hope to see all of you there for this incredibly important seminar.

The new leadership is as follows:
- President – Brian Barker, BarkerMorrissey Contracting
- Vice President – Eric Hutchens, SunWestern Contractors
- Treasurer – Bryan Eto, BeachFleischman
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Teresa Walker, Past President, golfed with Heather Markham, Eric Newton, and Jim Connell

As you can see, this was a Very Serious Tournament!

President Kris Roe golfed with Justin Newman, Candy Schwarz, and Kristi Sylvester

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