



The Source & Resource for  
Construction Financial Professionals



A Quarterly  
Publication of  
the Iowa  
Chapter of  
CFMA

## President's Message by Jane Rohr

Spring 2008

This is my first letter as Chapter President and I must admit this is somewhat daunting but here goes..... We are so fortunate to have such an active and committed leadership group that is working very hard to plan and implement another great year for the Iowa CFMA Chapter. We have some very exciting program and social outings planned, but as always, we are open to suggestions and involvement from all of our membership so please contact any of our board members and share your ideas and thoughts.

In April we participated in another joint CFMA/AGC meeting. The meeting consisted of two panel sessions discussing Paperless Offices and Implementing a Wellness Plan. CFMA Members Dave Stitz, (McAninch) Vicky Malin, (Olympic Wall Systems) Kathy Ladd (Baker Group) and Jesse Wurth (Weitz) all led the discussion on "paperless" environments. It was a very interactive and enjoyable session and we all came away with valuable knowledge regarding our own implementation. We also were very well informed on Wellness Plans and how beneficial they can be to companies and employees. Leading that discussion was Dan Boyer (Manatt's), Brook Rosenberg (Ahrold Fay Rosenberg) and Lori Wiedermin (Holmes Murphy). We all came away with some great ideas on implementation, cost reduction, need and "buy-in" for this process.



Our summer events are always a terrific opportunity to meet new people and spend some quality time with those you already know. We have a job site visit planned for May and our annual Iowa Cubs outing planned for June.

### News from the President

All of this is taking the long way of saying – join us at the meetings and outings! They are fun, informative and definitely worth your time. We look forward to seeing you soon.

## Peter Schwartz announced as new National President & CEO

The CFMA Succession Committee recently completed their search and announced that Peter W. Schwartz has been unanimously selected as the new President and CEO for CFMA.

Peter brings to CFMA his 25+ years of experience in leading and growing not-for-profit organizations. Peter also brings to CFMA and the Institute of Certified Construction Industry Financial Professionals (ICCIFP) an entrepreneurial spirit, as well as strong financial, strategic planning, and governance acumen. Peter, his wife, and their children are relocating to the Princeton, New Jersey area. Peter will attend the National Conference and officially begin his leadership role at CFMA after the Conference. In addition, Peter will become a non-voting Board Member of ICCIFP

The search followed the announcement and planned retirement of our current President & CEO, Bill Schwab. A retirement dinner is planned for Bill on Saturday, May 17th at the National Conference. If you are unable to attend, but would like to congratulate Bill on his retirement, please e-mail him at [wschwab@cfma.org](mailto:wschwab@cfma.org).

The Succession Committee was composed of CFMA and ICCIFP Board Members: Brian Cooney, Jason Henley, Patrick Monea, George Rebeck, Richard Rice, Kevin Schlueter, Ann Sims, Vickie Spotts, Todd Taggart, Steve Tenney, Marj Weber, and Chris Zaucha. Quoting Pat Monea, "The Committee was made up of an extraordinary group of CFMA leaders, representing every conceivable constituency within our great association. We were focused on finding the next leader of CFMA. We understood that we could not "replace" Bill, and we were looking for a leader to take us to a new level."

## Get to know—Jane Rohr...our new Chapter President

Every newsletter we will highlight one of our local chapter members so we can “Get to Know” them.

**Name:** Jane Rohr

**Family:** One daughter – age 27, two brothers and 6 nieces and nephews.

**Grew up:** I was born in the Omaha/Council Bluffs area but have lived in Des Moines since I was 5 years old.

**First paying job:** Part-time high school job at Minnie Pearl’s Chicken – no kidding!

**Colleges attended:** Drake University

**Current employer and position:** Graham Construction Co., Inc. I am the Controller and I have worked for The Graham Companies since 1985 and moved to Graham Construction in 1993.

**Company history/profile:** We are a commercial general contractor and construction manager specializing in health care construction. We work predominately in central Iowa with long-term projects in Carroll, Cedar Rapids and Pella.

**Something people may not know about your employer:** We have recently added a new Medical Equipment Management service that coordinates equipment purchases and installation

**Number of employees:** There are 22 employees in the office and an average of 85-90 in the field. We have a large, well trained, exceptional accounting staff of 3.



**CFMA member:** Since about 1999.

**What about CFMA made you want to join or remain a member:** I joined to learn more about the construction industry and I have stayed because of the great group of people involved in this organization and the friendships I have made.

**What do you like most about CFMA:** I like the educational and growth opportunities, especially the Regional and National Conferences.

**What would you like to see more of from CFMA:** I would definitely like to see more members attend meetings and events. Also, more member involvement in committees and board positions because it really doesn’t take much time, but adds so much value.

**How does CFMA assist you in your current position / career:** I learn something new and valuable at every meeting.

**Personal interests:** Reading, bicycling and travel

**Last book read:** The Ghost by Robert Harris.

**Person that has had the most influence on your life:** My father

## Member news

**Members on the move—**Jim McFadden has moved from Wolf Construction to Elder Corporation.

**Members in the news—**

**EDITOR’S NOTE—We know our members make the news...just tell us about it and we’ll include it here!**

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We’ve reserved space in our newsletter to report changes and announcements about our members. If you have something you’d like to let our members know about please send us an announcement!

Ideas include special recognition for member companies, promotions, achievements, unique projects, etc. This is a newsletter for our members...to keep our members informed and involved in the construction industry, so submit your information!

If you have any articles, for publication, we’d love to include it in our newsletter or help you submit it to CFMA Building Profits magazine. We’ve got great ideas, lets share them with other chapters!

## What you might have missed

In January we learned about construction claims and liens from attorney Jeff Stone from the Whitfield and Eddy law firm.

February's meeting included a presentation by Dan Schneider from Edge / Schneider Consulting. It included a perspective on identifying the cultural aspects of ownership transitional planning.

Kurt Maynard from Trimble Navigation gave the members in attendance a look at the possible uses for GPS technology in the construction industry. He demonstrated the value of the data that can be generated from the GPS systems to evaluate productivity, utilization as well as locations of equipment and their operators.

The meeting held in April was held in the fine city of Ames and was a joint meeting with the AGC's Controller Council. The morning session was a panel discussion regarding a paperless office and the afternoon session focused on implementing a wellness program. A special thanks to Kathy Ladd (Baker Group), Vicky Malin (Olympic Wall Systems) and Jesse Wurth (Weitz Senior Living) for participating in the panel discussion and Dave Stitz (McAninch) for facilitating.

(We don't want you to have to rely on this column to see what you might have missed, so don't miss out...attend the meetings!)

## What's coming up?

### Upcoming events

Summer schedules often result in a break from our regular monthly meeting, so we don't currently have any lunch meetings scheduled until late summer.

Summer is a great time to help out. Our board is always looking for members that can help with meeting and event planning, member recruitment, speaker ideas...and yes, even the newsletter.

The assignments for the summer months are to :

1. Find a new member for CFMA...the more the merrier.
2. Take pictures of your projects or one of our summer events and submit them to Jesse Wurth for inclusion in our newsletter.
3. Consider volunteering for a committee or leadership position locally or nationally...CFMA members consistently say they get back more than what they put in when they participate.

## Social opportunities and networking

### JOB SITE TOUR

Mark your calendars and get ready right away because the next social event is on Wednesday, May 14th! A job site tour is planned for 3:00 at the Animal Rescue League at 5452 NE 22nd St. in Des Moines. Hard hats and safety glasses will be provided. Make sure to send your RSVP to Gina Kanne (Gina.Kanne@rsmi.com.)

Following the tour, there will be a social gathering at Okoboji Grill located north of the job site at 2010 SE Delaware in Ankeny.

enjoy the game with fellow CFMA members. Please be sure to RSVP to Gina Kanne at Gina.Kanne@rsmi.com if you'd like to attend.

### PAST SOCIAL EVENTS

The annual CFMA bowling outing was held on Friday, February 29th at Plaza Lanes. Everyone had fun and the competition was fierce, but in the end, Steve Tenney prevailed once again. Great job Steve!

### IOWA CUBS OUTING

The Social Committee has set the date for the Iowa Cubs outing! CFMA at the Iowa Cubs will be on Wednesday, May 28th for an afternoon game that starts at 12:05.

Make an excuse at work, leave early for lunch and come out and see the Iowa Cubs take on the Memphis Redbirds and



About 30 CFMA members and guests enjoyed an outing on March 19th as the Iowa Energy basketball team took on the Anaheim Arsenal at the Wells Fargo arena. Special thanks to suite sponsors...The Weitz Company, Wells Fargo Bank and Baker Electric, Inc.

## Welcome new members!

Our local membership continues to change and we've added the following new members since our last newsletter. Please be sure to introduce yourself to them and welcome them to the Iowa Chapter the next time you talk with them!

- Brian Coller, CPA—Bergan, Paulsen & Company, P.C.

**Invite a potential member to a meeting so they can meet other members as learn more about CFMA!**

**Call a member too...let them know you'd like to see them at the meeting as well!**

## Member Companies—

ABC Electrical Contractors  
Allied Construction Services, Inc.  
Apollo Steel Company  
Architectural Wall Systems Co.  
Baker Electric  
Ball Construction Services L.L.C.  
Beisser Lumber Company  
Bergan, Paulsen & Company, PC

**Thanks to all our member companies for their participation in and support of CFMA**

Berkley Surety Group  
Breiholz Construction  
Cedar Valley Corp.  
CJ Moyna & Sons  
Concrete Technologies  
Construction Services, Inc.  
Corell Contractor, Inc.  
Corwin, Reichter & Company PC  
Denman & Company LLP  
Dormark Construction  
Elder Corporation  
Graham Construction Co., Inc.  
Gritton Associates CPAs  
Hansen Company, Inc.  
Heartland Asphalt  
Henning Construction

Holmes Murphy & Associates  
Innovative Captive Strategies, Inc.  
Iowa Prestressed Concrete  
J&K Contracting  
Johnson Machine Works  
JVC Builders  
Knife River, an MDU Resource Co.  
L.L. Pelling Co., Inc.  
Lamair-Mulock Condon Co.  
Larson & Larson Const., LLC  
Manatts, Inc.  
Marick, Inc.  
McAninch Corporation  
McGladrey & Pullen, LLP  
Merchants Bonding Co.  
Midland Holdings  
Nelson Construction Services  
Neumann Brothers Inc.  
Oldcastle Materials  
Olympic Wall Systems  
Pinnacle Construction Group  
Prairie Construction Co.  
Premium Business Insurance  
Reynolds & Reynolds  
RSM McGladrey, Inc.  
Ryun, Givens, Wenthe & Co., PLC  
Seither & Cherry Svcs., Inc.  
Story Construction Co.  
Stroh Corporation  
The Baker Group  
The Rasmussen Group  
The Sargent Group

The Travelers Companies  
The Waldinger Corp.  
The Weitz Company  
TWC Services  
United Contractors  
Valley Bank  
Van Hauen & Associates  
Wells Fargo Bank  
Wolf Construction  
Wolin & Associates  
Woodruff Construction

**If you have a suggestion for a new member, be sure to invite them to a meeting as a guest or contact a board member and we'll make sure they get prospective member information to them!**

## Contact Information



Check out  
[www.cfma.org](http://www.cfma.org) and  
[www.cfma.org/lowa/  
index.html](http://www.cfma.org/lowa/index.html)

### 2008 Board of Directors

- **President**—Jane Rohr-janer@grahamconstruction.com
- **President Elect**—Tom McCauley-tmccauley@strohcorporation.com
- **Secretary/Treasurer**—James McFadden-jim@eldercorp.com
- **Past President**—Mike Schroeder-mike.schroeder@weitz.com
- **Membership**—Brian Deimerly-bdeimerly@holmesmurphy.com
- **Social**—Doug Roozeboom-doug.roozeboom@rsmi.com
- **Program/Education**—Dave Stitz-dstitz@mcaninch.com
- **Publicity**—Jesse Wurth-jesse.wurth@weitz.com
- **At large**—Kathy Ladd-laddk@thebakergroup.com and Paul Morrison-pmorrison@waldinger.com

Consider volunteering for a committee or a leadership position in your local chapter or CFMA National. Member participation is always appreciated!

For membership information  
contact Brian Deimerly at  
515-223-6906 or  
[bdeimerly@holmesmurphy.com](mailto:bdeimerly@holmesmurphy.com)

**Iowa Update**—send your ideas and  
submissions to our publicity chair—  
Jesse Wurth at [jesse.wurth@weitz.com](mailto:jesse.wurth@weitz.com)  
or committee member—Steve Tenney  
at [stevetenney@storycon.com](mailto:stevetenney@storycon.com)

## CFMA NATIONAL CONFERENCE & EXHIBITION

If you've received this newsletter and aren't planning on attending CFMA's 2008 National Conference and Exhibition in Orlando Florida from May 17-21, you should certainly think about the conference a year from now!

Make sure you include the 2009 Las Vegas conference in your 2009 budget (you probably control that process anyway!) The conferences offer a fantastic series of seminars directly related to the construction industry and the challenges that many of us face day to day. The exhibitors are supporters of CFMA and represent the types of products and services that construction financial managers need. By the way, the 2010 conference is in Hawaii!



## HEARTLAND CONFERENCE

If you need a quality conference a little closer to home, you should certainly plan on attending the Heartland Regional Conference in Council Bluffs on October 2nd and 3rd. Like the National Conference, the Heartland Conference offers sessions that should help you in your job.

Planned topics include Credit Modeling, Critical Contract Clauses, the CFO's role in Strategic Planning, Personality and Assessment Tools, Internal Controls, Attracting and Retaining Employees and what conference would be complete if they didn't include something "green", so how about Selecting the Best Green Alternative!

Watch for more information and the registration form...encourage a co-worker or colleague to attend this one!