

2014 Industry Improvement Funds Conference

December 3-5, 2014



**Sponsored By
MCAA's Industry
Improvement Funds
Committee**

**Longboat Key Club
Longboat Key, Florida**

Mechanical Contractors Association
MCAA
of America

2014 Industry Improvement Funds 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—Industry Funds Roles and Responsibilities

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:

- **MCAA Update** – MCAA President Chuck Fell will present an update to the conference of the latest programs and news regarding national association activity.
- **Industry Funds Enforcement in Collective Bargaining Agreements** - The Department of Justice has recently tested a handful of associations on their collective bargaining agreements regarding the most favored nations clause, the anti-trust implications of such a clause and unions being put in a position to require non-members payment of industry funds and or association dues. Richard J. Sawhill, ARCA/MCA of Southern California, is one of the associations that were contacted by the Department of Justice (DOJ). He will provide a current update on his dealings with the DOJ regarding this matter. He reported on this subject at the recent collective bargaining conference, and will provide a more detailed report of what association executive directors, industry fund trustees and association board members may expect when the Department of Justice comes knocking.
- **Industry Funds Liability & Legal Challenges** – Elizabeth Manzo, a lawyer for Lindabury, McCormick and Estabrook is a leading expert on industry funds. She will give an update on recent legal challenges to Industry Funds and proper methods to protect your association's funding structure.
- **Construction Industry Paradigm Shift** – Steve Lamb, MCA of Chicago, will speak about some of the challenges the industry faces with technology, labor and globalization.
- **Bylaws Workshop** – *Optional AEC session*. This session, intended for association executives but open to all attendees, will be a workshop led by Elizabeth Manzo, an attorney at Lindabury, McCormick, Estabrook & Cooper, P.C. It will focus on ensuring association bylaws are in line with all governing documents and purpose.
- **Investment Strategies for Industry Funds** – This panel will discuss some standard methods for investing industry funds and legal requirements for their oversight.
- **Legislative and PAC Update** – MCAA's Legal Counsel, John McNerney, will provide a legislative update as well as a MCAA political action committee progress report.
- **Insurance Coverage Best Practices for Industry Funds and Associations** - Jack Cook, Partner with Cook and Kocher, will provide guidance on the insurance coverage necessary to oversee industry funds as well as their affiliated associations.
- **NEI Update** – Dennis Langley, MCAA's staff liaison to the National Education Initiative will showcase new NEI offerings that travel to affiliate associations.

Tentative Conference Schedule

Wednesday, December 3

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 4

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 – 8:45 AM
• **Chuck Fell**, CFI Mechanical

Industry Funds Enforcement in Collective Bargaining Agreements 8:45 AM - 9:30 AM
• **Richard Sawhill**, ARCA/MCA

Break 9:30 AM – 9:45 AM

Construction Industry Paradigm Shift 9:45 AM – 10:30 AM
• **Steve Lamb**, MCA of Chicago

Industry Fund Liability and Legal Challenges 10:30 AM – 11:15 AM
• **Elizabeth Manzo**, Lindabury, McCormick and Estabrook

Conference Update 11:15AM – 11:30 AM
• **Sean McGuire**, *Director of Industry Programs*, MCAA

Golf

Optional AEC Education Session – Bylaws Workshop 1:30 PM – 3:00 PM
• **Elizabeth Manzo**, Lindabury, McCormick and Estabrook

Friday, December 5

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

Investment Strategies for Industry Funds 8:00 AM – 9:00 AM

Legislative and Regulatory Update 9:00 AM – 9:45 AM
• **John McNerney**, *General Counsel*, MCAA

Break 9:45 AM – 10:00 AM

Insurance Coverage Best Practices for Industry Funds and Associations 10:00 AM – 11:00 AM
• **Jack Cook**, *President*, Cook & Kocher Insurance Group

NEI Update 11:00 AM – 11:45 AM
• **Dennis Langley**, Executive Director, MCERF

Closing Remarks 11:45 AM

Industry Improvement Conference

Longboat Key Club & Resort ■ Longboat Key, Florida

December 3 - 5, 2014



Attendee Information

Name _____ Badge Name _____
Spouse/Guest _____ Badge Name _____
Company Name _____ Title _____
Street Address _____
City _____ State _____ Zip _____
Registrant's E-mail _____ Cell Phone _____ Work Phone _____

E-mail address to send confirmation of registration: _____

Registration Type	Fees
MCAA Member	\$495
MCAA Association Executive	Comp
Spouse/Guest	\$100
Total Due	\$
Golf fees will be billed directly to your hotel room account. Pairings will be made at a later date.	
Please reserve a tee time for:	
Number of players: _____	Thursday, Dec. 4
Number of players: _____	Friday, Dec. 5

MCAA Cancellation & Refund Policy
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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 7, 2014**, 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
Beachview King/Double	\$269		
Lagoon View Club Suite	\$269		
Beachview Club Suite	\$289		
Beachview One Bedroom Suite	\$370		

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 to guarantee the room reservation. Cancellations prior to 14 days of arrival may result in forfeiture of deposit. **Rates are subject to current taxes equaling 12% plus a resort fee of \$20/room, per night.**

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