



Upcoming Events

June TBS, 2023- Site Visit and Happy Hour

June 28, 2023- Modern CFO Virtual Event ([Click here to register](#))

July 15-19, 2023- CFMA's Annual Conference ([Click here to register](#))

September 20-21, 2023- Buckeye Conference ([Click here to register](#))

September 29, 2023- Clay Shoot @ Rustic Sycamore Gun Club Lodge (*Save the Date*)

Construction Financial Management Association

CINCINNATI CHAPTER

Since 1987

Managing the Challenges of the Modern Subspecialty of CFO



Presenters:

Scott Bishop, CPA, CCIFP
Courtney Channell, CPA, CCIFP
Joe Harper, CPA, CCIFP
Moderator - Shawn Erickson, CCIFP

Description:

The role of the Specialty Trade CFO/Controller is ever evolving. Depending on your company's specialty, client base, employee base, geographic location, size and corporate structure, these roles can GREATLY vary. Join us in this panel discussion with three unique Subspecialty professionals as they share their experiences, challenges and give their tips for success. *(This session will also be presented live at the CFMA Annual Conference in July.)*

Learning Objectives:

- Understand the importance and influence that CFO/Controllers have in being agents of change for the company.
- Hear how putting "people" above all else should impact every aspect of a CFO/Controller's role.
- Hear opportunities the panelists have found to engage with the operations team, effecting both the top and bottom lines.
- Discover what keeps these professionals "up at night" and what they do to address those challenges.

When/Where:

Wednesday, June 28, 2023
12:00-1:30pm
Virtual Event

Who Should Attend: CFMA Members, Owners, CFOs, CEOs, Controllers

Registration:

Cost = Free for all attendees. 1.5 CPE Credit. Please register for this event online by visiting: <https://www.eventbrite.com/e/cfma-managing-the-challenges-of-the-modern-subspecialty-of-cfo-tickets-636790145467>

Contact Jill Claire cincinnati@cfma.org with questions.



[Click here to register for The Modern CFO](https://www.eventbrite.com/e/cfma-managing-the-challenges-of-the-modern-subspecialty-of-cfo-tickets-636790145467)

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Joseph J. Harper, CPA, CCIFP is the Corporate Controller at Kelley Brothers Roofing, Inc., an employee-owned commercial roofing company in Hamilton Ohio. He is responsible all financial operations, office staff, HR, Insurance, Banking and Bonding. He has more than 10 years experience as a controller in construction and development and, more than 10 years experience in Public Accounting serving the construction industry. Mr. Harper has presented, and co-presented many programs for the CFMA, as well as other construction organizations. He has authored and co-authored articles for (most recently) Building Profits and Thompson Reuters. He holds a BS in Accounting from Franklin University in Columbus, Ohio and is a Certified Public Accountant (CPA) as well as a Certified Construction Industry Professional (CCIFP). Joe is a past President of the Columbus and Cincinnati Chapters of the CFMA. He is the Chair of the CFMA's Education Steering Committee, as well as a member of their Executive Group.

Courtney Channell

Spend the first 17 years of my career in public accounting, focused on the construction industry – which I just fell into by luck as the partner at the first firm I worked for was building his construction practice. Left public in 2015 to go work for an audit client, however, they hired me to be Controller for their real estate and development company. After 5 years, missed the construction industry and joined another former audit client – a large (close to \$200M) mechanical contractor.

I have been a member of CFMA since 2001, starting in Columbus, OH and now in Charlotte, NC where I have served on the board since 2008, 4 of those years as Chapter President. I have been active for the past 10 years on various National committees and am currently serving on the Executive Committee.

Shawn Erickson, MBA, CCIFP, CFO,

Shawn is the CFO of C.J. Erickson Plumbing Co., a commercial plumbing and site utility contractor in Chicagoland. Shawn joined her husband's 4th generation family business in 1998 after working in public accounting and private industry. She holds an accounting degree from Michigan State University and an MBA from Keller Graduate school. She joined CFMA in 1999 and has served the Chicago Chapter as Chapter President, Board member and various Committee Chairs over the last 24 years. She is still very active in her chapter serving in various capacities where needed. On a National Level, Shawn has been a member of the Executive Committee, the Conference Planning Taskforce and various other committees. Shawn is currently the Chair of the National Subspecialty Committee and a member of the Leadership Development Committee. Shawn is a proud recipient of the 2017 Joe Quigley Award.

Scott Bishop, CPA, CCIFP

Scott is the CFO of Buist Electric, Inc., a commercial electrical contractor performing Electrical, Testing, Communications, Automation and AV work primarily in the West Michigan area. He joined Buist in 2014 after spending time in public accounting and performing management roles in the manufacturing industry. Scott holds a degree in accountancy from Calvin University. Since joining CFMA in 2014, Scott has served in various capacities on the Board including Chapter President, Committee Chairs and as a member on several committees. In addition to his CFO responsibilities Scott is a trustee of the Buist Electric ESOP. Outside of Buist and CFMA he has served at other local non-profit boards in leadership positions.

CPE:

The Construction Financial Management Association (CFMA) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website:

<https://www.nasbaregistry.org/>





Save the Date!

SEPTEMBER 2023

29

RUSTIC SYCAMORE GUN CLUB LODGE

LUNCH BEFORE & DRINKS AFTER





2023 BUCKEYE CONFERENCE



20 - 21 | SEPTEMBER

THE GRAND EVENT CENTER IN GRANDVIEW YARD
COLUMBUS | OHIO

AGENDA

TUESDAY, SEPTEMBER 19

6:00-8:30 p.m.
PRECONFERENCE RECEPTION
and Brewery Tours at 6:30 & 7:30
at High Bank Distillery

WEDNESDAY, SEPTEMBER 20

8:30 - 9:15 a.m.
REGISTRATION/BREAKFAST
9:15 - 9:30 a.m.

WELCOME
OHIO'S LT. GOVERNOR JON HUSTED

9:30-10:30 a.m.
KEYNOTE SPEAKER
Chris McAlister- Leadership Coach-Sight Shift

10:30 - 10:45 a.m.
Break/Networking

10:45 a.m. - 11:45 a.m.
SPEAKER
Chip Holcombe- Managing Director, One Columbus
Investor Relations

11:45 a.m. - 12:30 p.m.
SPEAKER
Porter Wright

12:30 - 1:30 p.m.
Lunch-and Chris McAlister book signing

1:30 - 2:30 p.m.
SPEAKER
Chris McAlister- Leadership Coach-Sight Shift

2:30 - 2:45 p.m.
Break/Networking

2:45 - 3:45 p.m.
SPEAKER
Tamar Chute- OSU "The Shoe" History

5:00 - 6:00 p.m.
SOCIAL HOUR
Social/Field Games/Behind
the Scenes Tours- Ohio Stadium

6:00 p.m.
Dinner at The Blackwell
The Blackwell

THURSDAY, SEPTEMBER 21

7:30 - 8:30 a.m.
BREAKFAST

8:30 - 8:45 a.m.
CFMA NATIONAL UPDATE
KEVIN FOLEY- *CCIFP-Chair- Madison Concrete Construction*

8:45 a.m. - 9:00 a.m.
CCIFP CERTIFICATION
JOE HARPER- *Controller, Kelly Brothers Roofing- CFMA Edu. Steering
Com. Chair*

9:00-10:00 a.m.
KEYNOTE SPEAKER
MAURICE CLARETT- *Former Professional Football Player*

10:00 - 10:15 a.m.
Break/Networking-and Maurice Claret photo op

10:15 a.m. - 11:00 a.m.
SPEAKER-Economic Update
SCOTT COLBERT- *Executive Vice President-Commerce Bank*

11:00 a.m. - 12:15 p.m.
SPEAKER
CFO Panel

12:15 p.m. - 12:30 p.m.
SPEAKER
Ohio Construction Academy Update

12:30 - 1:30 p.m.
Lunch

1:30 - 2:30 p.m.
SPEAKER-Intel on Intel
BETSY GOLDSTEIN- *Betsy Goldstein Consulting*

KEYNOTE SPEAKERS SPONSORS



DINNER SPONSORS



SEE OUR SPONSORS AND REGISTRATION ON THE NEXT PAGE

SPEAKERS



CHRIS MCALISTER
Leadership Coach



MAURICE CLARETT
Former Professional
Football Player



SCOTT COLBERT
Executive Vice President
Commerce Bank



TAMAR CHUTE
OSU Historian



KEVIN FOLEY
CCIFP Chair,
Madison Concrete
Construction



BETSY GOLDSTEIN
Betsy Goldstein
Consulting



JOE HARPER
Controller,
Kelly Brothers Roofing



JON HUSTED
Lt. Governor

[Click Here to Register for Buckeye Conference](#)



Shout out to our Education Committee:

Bill Steimer
Kyle Skotnicki
Mark Nelson
Maryann Cianciolo
Joe Riech
Kirsten Beckett

They are working hard to bring us some great events in the 2022-2023 year!
More details to come!

Join a committee!

Committees are a great place to build friendships with your industry peers – not to mention the give back to your professional organization! To get involved, please reach out to [*CFMA Admin Team*](#).

Don't forget to visit our [*website*](#) and follow us on [*Facebook*](#) and [*LinkedIn*](#) for the latest news!

We hope you'll take the time to follow us on LinkedIn and interact with our posts. Ask your company's marketing department to follow us on social media too.



CFMA's Annual Conference & Exhibition
July 15-19, 2023
Gaylord Rockies Resort & Convention Center



[Click here for more info and to register!](#)



It Takes a Team
by Thomas C. Schleifer PhD

Even with a visionary founder or CEO firmly in control, a professional team is necessary to execute the founder's or CEO's vision of success. As I referenced in last week's message, day to day management of construction work is like jumping from stone to stone. However, corporate and business management is a complex task that requires a totally different combination of skills, knowledge, and experience. In the highly competitive construction industry success depends on the ability to deliver high-quality projects on time, within budget, to the satisfaction of the client. An effective management team is, therefore, essential to achieve the company's vision of success that inspires the organization.

Obviously the skills and ability to produce the work are critical, but organizations that lack that ability simply fail in their first five to ten years. Companies that endure through startup then need to develop or hire the business skills to succeed through survival, success, growth, and maturity stages. The company needs the key people with the skills and abilities required to excel going forward.

To Read More about the Key People [click here](#)



CHAIRMAN'S EXCELLENCE

PROUDLY PRESENTED TO THE
GREATER CINCINNATI CHAPTER


THOMAS BORGIA
CHAIRMAN




STUART BINSTOCK
PRESIDENT & CEO

Thinking about taking the CCIFP exam in the coming year? We can help connect you with a study group and additional resources. If there is a strong enough demand, we will offer a CCIFP review course with neighboring chapters. For more information email cincinnati@cfma.org



INSTITUTE OF CERTIFIED
CONSTRUCTION INDUSTRY
FINANCIAL PROFESSIONALS

About ICCIFP

For more than 17 years, the ICCIFP has committed to developing and maintaining the CCIFP certification as the recognized standard of excellence for competent and ethical construction financial management.

The CCIFP Certification is based on the current construction landscape, focusing on the competencies and knowledge construction financial professionals needed to lead in today's competitive construction industry.

The CCIFP designation is endorsed by industry-leading organizations like ASA, CFMA, CICPAC, IRMI, NASBP and others.

In today's transparent climate, the ICCIFP is committed to fair and impartial management of all certification and re-certification activities, potential conflicts of interest and overall operations.

ICCIFP is proud to be ANSI Accredited. Being ANSI accredited means that the CCIFP certification meets the highest standards. This provides an added level of confidence in the certification and the people who hold the CCIFP designation.

ICCIFP is an independent, separately incorporated entity affiliated with the Construction Financial Management Association, the only organization dedicated to the needs of construction financial professionals.

For more about the CCIFP [click here](#).



Risks & Challenges of Construction Tech Adoption **by Rose Hall**

Today, the construction technology market is flooded with different tools. In fact, in 2020, early stage construction tech funding was \$374.9 million, while late stage funding was \$417.4 million; then in 2021, early stage funding increased to \$738.3 million, and late stage funding reached \$1.1 billion.

This increase in options is challenging contractors to determine which ones are right for them. While it's not a bad problem to have, too many choices can complicate successful adoption. As contractors are still dealing with some pressing issues that may have previously stood in the way of adoption like an aging workforce, talent shortage, notoriously slim profit margins, etc., more contractors are seeing realistic opportunities to turn to technology to help address these issues.

This article covers the different types of construction technology and common challenges that come with adoption.

[Click Here to Read More](#)



**Text HOME to 741741 to connect with a Crisis Counselor
Free 24/7 support at your fingertips.**



My Suicide Attempt Is Transforming an Organization by Vince Hafeli

1989 was a challenging year. My brother was pronounced terminal, my father passed at 59, and my wife and I lost twin sons.

In 1993, my brother passed on his daughter's fifth birthday, and we learned that my mother had cancer and would soon lose her battle.

During this period, I was a rising executive in the construction industry. I did not share my story or struggles. Instead, I acted the way men in this industry "are supposed to"; I was macho and robust, not looking to share, be perceived as weak, or lose the next promotion.

Time marched forward, and these events weighed on me. In 2007, while

experiencing a failing marriage and after another uncomfortable conversation at the dinner table, I decided I would take my life. I drove away from my house to where my life would end when I received a phone call that saved me.

To read more [click here](#).



CCIFP is in need of volunteers to moderate study groups. CCIFP candidates band together to set study times and present topics. The moderators also add color to the topics, and make sure things stay on track.

Please contact Veronica Whitehead at CFMA to volunteer today!

vwhitehead@cfma.org

Fredric Baur was a Cincinnati chemist who invented the Pringles can. Upon his death in 2008, he was cremated, and the ashes were placed in an empty can of Original Pringles. The can is buried at Arlington Memorial Gardens in Mount Healthy.



[To Read More about Fredric Baur Click Here](#)



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