



2023-2024 Education Schedules

May 17, 2023: 2:00 – 3:30 PM ET *An Association's books and records*. An introduction to the basics of bookkeeping, taught by an accounting professional, Dawn Minemier of The Bonadio Group, will cover how to prepare an association budget and track expenses against budget line items. Additional items to be covered are Form 990's, understanding a financial statement and common financial mistakes of small associations.

June 29, 2023: 2:00 – 3:30 PM ET *Understanding a contractor's business*. This seminar presented by Western Allied former CEO, Angie Simon, will cover the primary factors impacting the profitability of sheet metal contractors' business. From change orders to labor costs, this session will give chapter executives a working knowledge of what generally makes or breaks a contractor's business.

July 2023: *The business of associations* (held in-person in conjunction with Chapter Executive Orientation). This seminar will cover some of the basic functions of the chapter, including event planning, industry promotion, associate member management, and contractor education.

August 10, 2023: 2:00 – 3:30 PM ET *Labor Law 101*. Labor law expert, Tom Trachsel, from Felhaber Larson, will provide the legal framework within which unions and associations must operate. Topics covered will include common terms and phrases explained, unfair labor practices (ULP), communicating with union members, hot cargo provisions and more.

September 26, 2023: 2:00 – 3:30 PM ET *Politics and Structure: Working with your Union Partners*. Former SMART Local 80, Business Manager Mark Saba will describe the inner workings of a local union. To truly work effectively with a local union, one must understand the interplay between the business manager, the local's executive board and the local's members,



both active and retired. SMART International's structure and relationship with its locals will also be covered.

October 5, 2023: 2:00 – 3:30 PM ET *Association Law*. Chapter executives must concern themselves with not only non-profit, association, and tax laws but be familiar with the complex legal concepts around inurement and antitrust to keep their association out of trouble. This seminar led by Dan Kelly, of Felhaber Larson, will cover these laws and the best practices for operation that will safeguard an association from potential liability.

October 2023: *HR for small employers* (held in-person in conjunction with Convention). Managing a small office can often be more challenging than a large one for the person in charge of HR. Small offices often mean close quarters and frequent interactions between coworkers that cannot be mitigated easily. Labor and Employment expert Dan Kelly, of Felhaber Larson, will teach chapter executives how to navigate the myriad of HR laws applicable to small business while also maintaining a productive and welcoming workplace for all.

November 14, 2023 : 2:00 – 3:30 PM ET *Insurance Policies*. Patrick Cunningham of SMACNA's Premiere Partner, Federated Insurance, will detail the types of insurance every association should have in place as well as the factors the association should consider when determining coverage levels. Federated will also discuss optional coverage lines and when they should be strongly considered. Finally, Federated will also give a brief overview of common construction business coverage and answer common questions a chapter executive may be asked.



December 7, 2023: 1:00 – 2:30 PM ET *Sheet Metal Industry Introduction*. Eli Howard, SMACNA’s Executive Director of Technical Services and Research, explains what the sheet metal industry is for those who have not worked for a contractor or in the field. This session will introduce chapter executives to common terms, systems, and technologies within the sheet metal industry as well as an overview of the major sectors that most sheet metal contractors work within.

January 10, 2024: 2:00 – 3:30 PM ET *Maintaining a labor-management relationship*. A panel of experienced chapter executives, Ginger Slaick, Stacey Smyly, John Sindyla, and Charlene Zezawa will discuss methods for maintaining a working, and preferably good labor-management relationship with the union during the life of the collective bargaining agreement. The panelists will discuss how to approach both the union official who is open to a good relationship as well as those where the relationship is more challenged and how they may have changed the relationship over time.

January/February 2024: *Board of Directors Relationships and communicating value of the association to contractors* (held in-person in conjunction with Chapter Executive Institute). A good working relationship with a chapter’s board of directors is second only in importance to ensuring that contractors understand the value that the SMACNA chapter and National bring to them. This seminar will explore the tools and tricks for achieving both.

February 15, 2024: 2:00 – 3:30 PM ET *Legislative Advocacy*. Monitoring local and state legislation for laws that impact contractors and their business is a primary function of a good chapter executive. This seminar, with Stan Kolbe, SMACNA’s Executive Director of Government and Political Affairs, will guide chapter executives on how to go the next step of advocating for their contractors’ interest before their legislators, county commissioners etc. This seminar will also cover the legal considerations around lobbying activity of the chapter.



March 6, 2024: 2:00 – 3:30 PM ET *Fringe Benefit Funds*. A multiemployer plan is a foreign concept to most people who come from a world of single employer health plans and 401ks. This seminar, with Tom Hughes of Felhaber Larson, will help executives understand the basic functions of multiemployer retirement, health and training funds. Additionally, the seminar will cover the fiduciary role of the chapter as a benefit fund sponsor.

April 17, 2024 : 1:00 – 2:30 PM ET *Construction trends*. Guy Gast, with the New Horizons Foundation, will explore trends in the construction industry and future trends that are predicted that chapter executives need to be aware and potentially provide education on to their contractors.