



LABOR MANAGEMENT CONFERENCE

Solutions, Not Excuses

Agenda

Thursday 9/15

7:30-9:00 Registration and Breakfast

9:00-9:15 Opening Statements - **Jeff Merhoff (IUPAT DC7)**

9:15-10:00 Keynote Speaker - **Dennis Doran**

10:00-10:30 Economic Review - **Tim Black & Jeff Benoit (Fiduciant)**

10:30-10:45 Break

10:45-11:15 Pension Discussion - **Angela Jefferies (United Actuarial)**

Many plan sponsors are looking for alternatives to traditional Defined Benefit Plans in an attempt to mitigate risk from poor investment experience and Employer Withdrawal liability. This session looks at alternative designs including Defined Contribution, Variable Benefit, Variable Accrual, 414(k), and Cash Balance.

11:15-12:00 Mental Health/Substance Abuse - **Chris Scheiblein & Bob Swanson (IUPAT)**

During this session, we will be discussing the vision and future plans for the Helping Hand Program and discuss ways in which the union and the contractors can work together to advance the positive message of the program, and provide the accurate resources for the members in their area who need help. We will cover why this topic is difficult to approach and provide tactics and strategies to help people feel more comfortable to reach for help, as well as how to support fellow workers who are dealing with behavioral health issues. Additionally, we will provide some insight from a contractor's perspective and identify the challenges contractors face on a daily basis (Bob Swanson). He will also give the perspective from a parent who was forced to deal with these issues on a personal level.

12:00-1:00 Lunch

1:00-2:00 Marketing the Finishing Trades
- **Brian Baker & Steve Kulovits (Great Lakes Finishing Solutions)**

Marketing the finishing trades by working closely with paint, drywall, and glazing contractors; to help pair those signatory contractors, with general contractors, property managers, commercial real estate brokers, and building owners, providing each with coatings and glass solutions for a variety of projects. Introducing a strategy to build a strong network of finishing contractors who can complete any job.

2:00-2:30 Pre-Apprenticeship - **Lindsay Blumer (WRTP Big Step)**

Today's governmental, economic and labor market shifts have put a spotlight on workforce development and policy initiatives that expand talent pipelines and engage adults and youth in new ways. Learn how WRTP | BIG STEP is leveraging their innovative workforce intermediary model to focus on equitable pre-apprenticeship pathways and assisting federal entities and local communities in ensuring continued investments in Wisconsin's strong union trades yield a diverse, trained and safe talent pipeline.



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- 2:30-3:00 **Government Funding - John Doherty & Andy Buck (IUPAT DC7)**
Opportunities and Workforce Development Strategies in Infrastructure
- 3:00-3:15 Break
- 3:15-4:30 Breakout Sessions by Trade
- 4:30-4:45 Closing Remarks
- 5:00 Reception & Dinner
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Friday 9/16

- 7:00-8:00 Registration and Breakfast
- 8:30-9:30 **Construction Business Group Update - Cindy Buchko & Robb Kahl**
The presentation will provide the audience with: an overview of misclassification; a summary of Construction Business Group's recent work battling misclassification; and an analysis of political and other factors influencing misclassification.
- 9:30-9:45 Break
- 9:45-10:15 **Understanding the Elements of a Standard Construction Subcontract - Matt Marcellis (ACEA)**
If a project doesn't go as planned, your contract is vital. Don't be taken unaware over what it contains, understand what standard clauses REALLY mean.
- 10:15-11:15 **Accreditation/New Training Opportunities - Pat Rome & Adam Holmes (Higher Education Accreditation Consulting)**
This presentation explores the benefits of institutional accreditation raising the quality of DC 7 Training Center's registered apprenticeship programs to a new level. With the merger of funds in progress, accreditation provides the opportunity for envisioning a new educational institution with a mission aligned with all stakeholders. Putting a strategic plan in place and executing initiatives that are targeted to attracting new apprentices and expanding the skills of current members will support the workforce development needs of signatory contractors and grow union membership. Forming community partnerships and deploying a marketing program championing career technical education is a proven growth formula.
- 11:15-12:00 **Industry Advancement Fund - Jeff Merhoff & Brian Baumgartner (IUPAT DC7)**
- 12:00-12:15 Closing



SPEAKER BIOGRAPHIES

Jeff Mehrhoff | IUPAT District 7

Jeff Mehrhoff Business Manager/Secretary-Treasurer of District Council 7. Painter by trade from Local Union 802 (Madison, Wisconsin). Served in various roles, including Vice President of LU 802 and elected Business Agent and Governmental Affairs Director of DC 7. Current role as BMST since 2016.

Dennis Doran |

Dennis D. Doran has over 40 years of experience in a variety of industries and sectors that all have 2 things in common – people and service. Dennis' message on the vital importance of developing and valuing soft skills is delivered with passion informing and motivating audiences. Dennis is well known to our finishing trades community since his initial engagement for LMCI over 12 years ago to develop and launch a Project Management Program for which he has served as the Principal Instructor. He also developed and teaches a course on estimating – Estimating Essentials. And he also delivers a soft skills workshop. These 3 programs constitute the IFTI's Member and Contractor Education offerings.

Tim Black | Fiduciant

Tim services institutional clients by providing counsel and guidance on portfolio design, asset allocation, manager selection, investment policy statements and overall performance monitoring. Prior to joining the firm in 2022, he was a Senior Business Development Advisor for PNC Financial. Tim earned a BS degree from Carroll University. He obtained the title Certified Investment Management Analyst (CIMA®) from the Investments & Wealth Institute™ accreditation program at the University of Chicago Booth and is a Chartered Retirement Plans Specialist (CRPS). Tim currently serves on the board of the Waukesha County YMCA and volunteers with his family for various nonprofits. His interests include playing and watching sports with his three kids, competitive mountain biking, hunting, fishing and spending time with family.

Jeff Benoit | Fiduciant

Jeff joined Fiduciant Advisors in 2000 and is the Director of Taft-Hartley Consulting. Working with the firm's team of consultants, he provides investment consulting services by giving advice and information on the manager search process, fund selection for portfolios and overall investment management. Jeff leads our Taft-Hartley Business Council. Prior to this, Jeff was president of an advisory division of LaSalle Street Securities, L.L.C. He obtained the title of Certified Investment Management Analyst (CIMA®) from the Investments & Wealth Institute™ accreditation program at the Wharton School of Business. Jeff has been a guest speaker at several national conferences related to Taft-Hartley services. He is also on the Advisory group to the annual Made in America conference which is dedicated to providing ongoing education to the Taft-Hartley community. Jeff is the head of the stewardship committee of his local parish and leads a team of volunteers who serve the homeless breakfast on a monthly basis. He enjoys golf and snowmobiling.

Angela L. Jeffries | United Actuarial Services

Angela is a Consulting Actuary at United Actuarial Services in Carmel, Indiana. She has 18 years of experience in the multiemployer pension field and currently provides consulting and/or actuarial services to 15 multiemployer pension funds. Angela's responsibilities include reviewing actuarial valuation reports, employer withdrawal liability reports, PPA certifications, Schedule MB's, and plan design studies. She earned a Bachelor of Arts degree with Highest Distinction in Mathematics from Indiana University Southeast. Angela is a Fellow of the Conference of Consulting Actuaries (FCA), an Enrolled Actuary (EA) under the provisions of ERISA, and a Member of the American Academy of Actuaries (MAAA).



Steve Kulovits | Great Lakes Finishing Solutions

Steve has over 20 years of experience in, and knowledge of, the painting and coatings trade. Before joining Painters District Council No. 30 (PDC 30) and forming the Finishing Solutions Network - North Central Illinois (FSN-NCI), Steve held several positions within the Sherwin Williams Company (SW); beginning his career with SW as an Intern in 2001 and exiting as a District Sales Manager in 2013, primarily responsible for coaching, training, and managing a team of 15 Professional Coatings Sales Representatives for the Greater-Chicago market. Over the past nine years Steve has led the marketing efforts for PDC 30 and the Finishing Contractors Association of Illinois. Taking the FSN-NCI brand to new heights as Bid Evolution. In his current role, Steve has worked closely with painting, drywall, and glazing contractors; to help pair those signatory contractors, with general contractors, property managers, commercial real estate brokers, and building owners, providing each with coatings and glass solutions for a variety of projects. Throughout his years in the industry, he has built a strong network of finishing contractors who can complete any job. Steve received his Bachelor's degree from Northern Illinois University in December of 2002, where he majored in Marketing with a Sales emphasis. Steve, his wife, and three young boys reside in Wheaton IL.

Lindsay Blumer | WRTP | BIG STEP

Lindsay Blumer is a respected nonprofit organization professional with over 20 years of experience in executive leadership, strategic planning, entrepreneurship, social enterprise and innovation. Blumer has worked as a community fellow with United Way of America designing community impact solutions, in state government advising and developing advocacy strategies and policy work in various appointed roles, advancing curricular and program design as Assistant Dean at Ripon College, creating collaborative community-based solutions as the executive director of a domestic violence and sexual assault prevention organization and developing entrepreneurial pathways for students at Marquette University. Her dedication to mission-based and community-focused work continues to drive her personally and professionally as the President & CEO at WRTP | BIG STEP, a workforce intermediary connecting traditionally disenfranchised people to quality career opportunities, based in Milwaukee, Wisconsin.

Cindy Buchko | Construction Business Group

Cindy Buchko is the General Counsel of Construction Business Group. Prior to joining CBG in 2014, she spent 15 years in private practice and was a shareholder and Vice President of Legal Services of a leading Wisconsin law firm where her practice was concentrated on regulatory approvals for large infrastructure and other construction projects. Cindy is also active in the legal and nonprofit communities. She is a past Board Chair and Board Member of the Construction Law section of the Wisconsin State Bar and a board member of the YWCA of Madison Foundation. Cindy graduated Summa Cum Laude with a Bachelor of Arts from University of Wisconsin-Milwaukee and then graduated Cum Laude from University of Wisconsin Law School.

Robb Kahl | Construction Business Group

Robb Kahl has served as Executive Director of Construction Business Group since 2008. CBG has grown to an organization that protects the interests of over 30,000 construction workers and 4,000 contractors throughout the state. Robb also currently serves as Chairman of the Unity Bank holding company and President and partner of Generations Title Company. Robb currently serves on the boards for Fair Rates for Wisconsin's Dairyland, the Madison Club and Four Lakes Education, Inc. He served four terms as Mayor of the City of Monona and two terms as a State Representative in the Wisconsin Legislature including service as a Member on the State Building Commission and as Ranking Member of the Assembly Transportation Committee. Robb graduated Cum Laude from Ripon College and then graduated Cum Laude from the University of Wisconsin Law School.



Matt Marcellis | Allied Construction Employers Association

Matt Marcellis serves as the Executive Director for the Allied Construction Employers Association (ACEA) in Brookfield, Wisconsin. In this role, he works with the ACEA's Board of Directors on issues including governance, strategic planning, and budget strategies. Mr. Marcellis serves the ACEA in all labor relations functions, including collective bargaining and grievance-dispute resolution. He serves as an employer-appointed trustee on several Taft-Hartley benefit trust funds covering the Milwaukee and Wisconsin markets. In addition, he serves on industry committees and boards in support of the goals of the ACEA and its constituent members.

Patrick Rome | Higher Education Accreditation Consulting

Patrick Rome has been in consulting and leadership roles for executive management, strategic planning, financial planning and analysis, accreditation, executive mentoring, fund development, grant writing, workforce development, community partnership development, government relations, institutional governance, and registered apprenticeship for over 35 years. He has consulted hundreds of institutions, businesses, organizations, and individuals, in education, non-profit and business settings. He holds degrees in Higher Education Leadership, Finance, Management and Accounting. Patrick is a principal at Higher Education Accreditation Consulting, LLC and Lakeview Guidance, LLC. Mr. Rome is a former entrepreneur, business executive and investor partner and is experienced at growing revenues, products, services, and bottom lines. He is experienced at post-secondary education leadership, especially in career and technical education. He was also appointed as a commissioner to the Council of Occupational Education in 2017 through 2021, a US Department of Education accrediting agency dedicated to career and technical education.

Adam Holmes | Higher Education Accreditation Consulting

Adam is the Director of Training for the Western Great Lakes Finishing Trades Institute (WGLFTI), a division of the International Union of Painters and Allied Trades (IUPAT) District Council 7 representing Wisconsin and the U.P of Michigan. He has served in that capacity for the last 15 years and has been a proud member of IUPAT Local 781 for over 30 years. Adam completed his apprenticeship as a Painter/Decorator in 1996 and received that years Apprentice of the Year Award from the Milwaukee Area Painters and Drywall Finishers Joint Apprenticeship Committee. In his current job, he is responsible for overseeing the apprenticeship programs for the Painters, Drywall Finishers and Glaziers. In addition to the work he does with the JAC's and apprentices, Mr. Holmes is also in charge of the safety training and journeymen upgrading classes for IUPAT DC 7. In 2014, Mr. Holmes received his B.A. from the National Labor College with a double major in Labor Studies and Labor Safety and Health.

Chris Scheiblien | Director, IUPAT Helping Hand Program

Chris Scheiblein has been working as an Employee Assistance Professional (EAP), since 2006. He started as a Peer Counselor at the Allied Trades Assistance Program (ATAP) in Philadelphia and soon transitioned to the Clinical Coordinator position in the same organization. As of June 2022, Chris has taken on the role of Director, for the Helping Hand Program, as part of the IUPAT. Prior to his work as a union EAP, Chris was a member of Local 1 Bricklayers and Allied Craftworkers, in PA/DE, where he worked on prominent Building Trades' masonry restoration projects. Chris also spent a short time working in Ironworkers Local #401 in Philadelphia. Chris grew up in Northeast Philadelphia, and now lives in Montgomery County, PA with his wife and young son.

John Doherty | Special Assistant to the General President, IUPAT

SAGP John Doherty has held various positions, roles and responsibilities in his 28-year career with the International Union of Painters and Allied Trades. John sits on various advisory boards and steering committees related to climate and infrastructure implementation including the Climate Jobs National Resource Center, the Emerald Cities Collaborative, and the BlueGreen Alliance to advance and promote clean, sustainable jobs in the new green economy. Currently, Mr. Doherty serves in the role of Special Assistant to IUPAT General President, Jim Williams Jr., where he manages federal agency relationships and advises the IUPAT on matters of climate, energy, and infrastructure and workforce development.

