

Strategies
to Impact
Your
Bottom Line



FINANCIAL, INSURANCE & RISK MANAGEMENT FORUM

November 14-15, 2012

Villas of Grand Cypress • Orlando, FL



Specialized
Carriers
& Rigging
Association

Register online at www.scranet.org/events

PRE-EVENT SESSION—Open to SC&RA Members Only

WEDNESDAY, NOVEMBER 14

8:00 am – 1:30 pm

SUCCESSFUL FINANCIAL STRATEGIES FOR YOUR SPECIALIZED COMPANY



Mike Whitlock

Speaker: Mike Whitlock, President, Tannian Consulting, Redmond, Washington

This program will combine the elements of critical financial management with strategic planning and will incorporate the most important findings of the SC&RA 2011 Financial Benchmarking Study (conducted in 2012) as planning tools. Participants will come away with new insights on how to prosper in their unique industries and manage their businesses for improved performance and a stronger future. More

importantly, they will develop a written strategic financial plan focused on their own companies to manage for stronger cash flow, improved earnings, and more successful growth. The session will be very goal oriented, as every financial area will translate to a unique goal and action plan for each participant's company. Strengths and weaknesses will be analyzed and a corresponding action plan will be developed. Key areas of focus will include:

Industry Financial Trends: 2011 Financial Benchmarking Study

- Focusing on the results and application of the Benchmarking Study
- Providing new insights into the financial parameters of the unique industries operating under the SC&RA umbrella

Strategic Balance Sheet Management

- Measuring and Improving Liquidity, Managing Debt Structure, Minimizing Risk and Maximizing Return

Strategic Income Statement Management

- Analyzing Sales Performance & Setting a Sales Goal
- Analyzing & Improving Gross Profit Margin
- Managing Overhead and Fixed Cost to Enhance Profitability

Improving Cash Flow

- Increasing Accounts Receivable Turnover
- SC&RA Best Practices to Improve Cash Flow

Refining Sales Goals and Growth Strategies

- Applying Sustainable Growth
- Planning for 2013 and Beyond

IN ORDER TO RECEIVE THE GREATEST BENEFIT FROM THIS PROGRAM, PARTICIPANTS MUST BRING THE FOLLOWING:

- Financial statements (Income Statements and Balance Sheets) for the company's three most recent fiscal year end periods. If three years are not available, bring as many as possible;
- Interim Income Statement for as many months that are available since the company's most recent year end along with corresponding Balance Sheet;
- A calculator.

Financial information will NOT be shared with other participants and will be held in the strictest confidentiality. This seminar is open to ALL SC&RA Members. Participation in the 2011 Financial Benchmarking Study is not required to attend.

PROGRAM-AT-A-GLANCE

WEDNESDAY, NOVEMBER 14

2:00 pm – 3:30 pm

RISK POOL MANAGEMENT – CONTROLLING THE HIDDEN HEALTHCARE COSTS WITHIN YOUR INSURANCE PLAN



Randy Johnson

Risk Pool Management is essential in building a strategy to reduce cost and sustain a reasonable cost curve over the long term. This process allows you to see your plan structure from a higher level so that it can be appropriately assessed. At the same time it will allow you to:

- Understand the real drivers of healthcare costs
- Remove the mysteries of renewal pricing
- Control the escalating costs of your medical plan

If your company is focused on finding ways to reduce costs without cost-shifting and plan degradation propositions, then you will find this concept invaluable. Employers that have implemented Risk Pool Management strategies have experienced an average 4.2% savings trend over the last 8 years.

Speaker: Randy Johnson, Sr. Vice President, Hays Companies

3:30 pm – 3:45 pm

REFRESHMENT BREAK

Sponsored by: Buckner Insurance Company

3:45 pm – 5:00 pm

BACKGROUND CHECKS 2012



Patrick Martin

Can employers still investigate their employees and applicants? Last year the Supreme Court acknowledged an employer's strong interest in "employing a competent, reliable workforce" and "separating strong candidates from weak ones." Many employers, especially multi-state and multi-national companies, are finding it challenging to implement that basic concept due to the intersection of federal and state laws regulating the use of information such as credit reports and criminal records in the hiring process.

Employers also must contend with the rising tide of so-called systemic discrimination investigations by the EEOC and private class action lawsuits under the FCRA. In this session Littler attorney, Patrick Martin, will review the best practices of U.S. and multi-national employers and provide recommendations to help mitigate the significant legal risks in this area. Patrick has extensive experience in this area and valuable knowledge on the patchwork of laws regulating the use of criminal background and credit checks.

Speaker: Patrick Martin, Partner, Littler Mendelson

5:15 pm – 6:30 pm

COMMON RISKS – PRACTICAL THREATS



Alan Ashlock



Jay Folladori

Industry studies and insurance claims statistics are invaluable for evaluating and planning but this session, presented by four SC&RA member principals, will provide the most timely update of real-world risks and threats to efficient, safe and profitable operations. Capture first-hand information on some of the common concerns as well as the unique issues that face our industry today and pose potential hurdles and threats for tomorrow. More importantly, find out what member companies are doing to address these issues.



John McTyre



James Robertson

Panelists:

Alan Ashlock, President, Crane Rental Corporation

Jay Folladori, Vice President, Heavy & Specialized, Landstar Transportation

John McTyre, COO, McTyre Trucking

James Robertson, President, Allegiance Crane & Equipment

7:00 pm – 8:00 pm

WELCOME RECEPTION

Sponsored by: NBIS

PROGRAM-AT-A-GLANCE

THURSDAY, NOVEMBER 15

7:30 am – 8:30 am

CONTINENTAL BREAKFAST

Sponsored by: Buckner Insurance Company

8:30 am – 10:00 am

CONTROL EXPOSURE AND MANAGE COSTS USING YOUR INSURANCE POLICY



Robert C. Moore

How does CSA Impact My Business?

Regardless of your type of operation, the Federal Motor Carrier Safety Administration's Compliance, Safety and Accountability program (CSA) affects all drivers of commercial motor vehicles. Enforcement of the program through inspections and citations often leaves owners expecting an increase in premium at policy renewal time. Are your drivers aware of the most current Do's and Don't's of the CSA program? Bob Moore will review the latest changes to the CSA program that are effective July 2012.



James Jinhong

Gaps in Coverage and Controlling Cost

Depending on the insurance coverage you purchased, there may be coverage gaps, potentially exposing your operations to undue risks and costs. When it comes to your insurance policy, price does not always guarantee quality coverage when you need it most. Jim Jinhong will review the most common coverage gaps and corrective actions along with simple strategies of using your policy to control the cost of doing business.

Contract Checklists

Learn how to identify indemnity laws in the states of operation and how to put these laws to work for you and protect your business. Bob Moore will explain how to leverage NBIS' proven contract checklist with every contract you sign. When it matters most, contract language can assist in managing risks and maximizing profits.

Speakers: Robert C. Moore, Chief Legal Officer and James Jinhong, SVP Underwriting, NBIS

10:00 am – 10:15 am

REFRESHMENT BREAK

Sponsored by: Buckner Insurance Company

10:15 am – 11:30 am

WELLNESS PROGRAMS & STRATEGIES IN OUR INDUSTRY—SERIOUSLY?

One might think that implementing and managing wellness programs for crane operators, truck drivers, riggers, mechanics and management personnel in our industry would be a monumental undertaking and require a total culture shift. Conversely, if owners and top managers stop and evaluate the effectiveness of wellness programs and the impact on productivity and profitability, establishing a healthy culture and managing these programs becomes a viable and extremely beneficial strategy.

This session will provide valuable insight on understanding the needs within your employee population, health risk assessments, evaluating health insurance costs and trends, planning wellness programs and evaluating program data. Moreover, the session will provide some industry-specific case reviews and help you understand how to get results and maximize the effectiveness of wellness initiatives. Presented by a patient advocate who has created win-win solutions for groups and employees, Ms. Tobler will help employers understand how to balance the needs of the individual with the fiscal responsibilities of the company.

Speaker: Melissa Tobler, RN BSN, Vice President, Health Strategies National Practice Leader, Hays Companies

11:45 am – 12:45 pm

LUNCH



PROGRAM-AT-A-GLANCE

THURSDAY, NOVEMBER 15 (cont.)

1:00 pm – 2:15 pm

CRISIS COMMUNICATIONS & PRACTICAL IMPLICATIONS



Bruce Cordingly

Is your company prepared to handle the public communications resulting from a full-blown crisis of a crane collapse or a trucking accident? Are you ready to be at your best when the situation could not be worse? Are you equipped to respond to a deluge of media calls from hungry reporters and angry bloggers?

If you wonder about the importance of a good crisis response, just ask Tiger Woods, Rupert Murdoch or the Susan G. Komen Foundation. Join the communications experts from Sound Counsel Crisis Communications LLC for a crash course in risk assessment, developing a crisis communications plan and the Do's and Don'ts of engaging the media on the internet during a crisis. Specializing in crisis readiness and crisis management, Sound Counsel is SC&RA's partner for helping member companies assess vulnerabilities and develop customized crisis communication plans that stress openness, accountability and accuracy.

You'll learn more about the Crisis Communications Preparedness Program SC&RA has developed with Sound Counsel exclusively for SC&RA members and how your company can benefit from the program.

Speaker: Bruce Cordingly, Principal, Sound Counsel Communications LLC

2:15 pm – 3:30 pm

LESSONS FROM HELL...PRACTICAL IMPLICATIONS OF DEALING WITH CRISIS



James Lomma

In 2008, James Lomma took a phone call and faced a day that no owner in our industry ever wants to address. A tower crane owned and leased by J.F. Lomma, Inc. collapsed in Manhattan, NY; two workers were killed in the accident. The accident became high-profile in the NY media and trade press and carried implications beyond what any business owner or manager could imagine. As a result of the accident, Mr. Lomma was brought up on charges of second-degree manslaughter, assault, criminally negligent homicide and reckless endangerment. The case was heard in the New

York Supreme Court in Manhattan and on April 26, 2012, Mr. Lomma was found innocent of all charges.

Mr. Lomma clearly maintains that despite being found innocent, lives were lost in this 2008 accident and his verdict was not cause for celebration. Conversely, Mr. Lomma believes owners and managers can learn a great deal from his experiences and has agreed to share his story and lessons and shed some light on related topics such as business and family pressure, financial implications and industry precedent.

Speaker: James Lomma, President, J.F. Lomma, Inc.

ESSENTIAL INFORMATION

HOTEL INFORMATION

The Villas of Grand Cypress offers guests world class amenities and a choice of magnificent villa-style accommodations within walking distance of the meeting/conference center, golf, endless recreation, exquisite dining and much more all wrapped into a world-class 1,500 acre Orlando golf resort.

AIR TRAVEL

The Villas of Grand Cypress in Orlando is located 20 miles (approximately 25 minutes) from the Orlando International Airport (MCO). The airport is serviced by all major airlines.

TAXIS

The average fare from the airport to the Villas is \$50. Other transportation options are provided by Skyline Destination Management. Contact them at (407) 239-2520 or skylineVIP@aol.com

RENTAL CARS

SC&RA group rates are available through Avis. Please reference the code D757632 when calling 1-800-331-1600 to receive the best car rental rates available. To make reservations online please visit www.avis.com.

WEATHER

The average high temperature in Orlando during November is 78° F and the average low is 57° F.

ROOM RESERVATION

2012 Financial, Insurance & Risk Management Forum
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PLEASE PRINT OR TYPE

Name		
Street Address		
City/State/Country/Zip/Postal Code		
E-mail (Confirmation will be sent to this address)	Fax	Telephone
Arrival Date	Departure Date	

Early arrivals or late departures will be honored on a space available basis.

Desired Accommodations: (rates listed do not include 12.5% state and local taxes).

Club Suite.....\$189.00 Bed type: King Double



Special Requests:

Wheelchair Accessible Visually Impaired Equipped Hearing Impaired Equipped Other _____

We are unable to guarantee requests for bed types or room location, however, we will make every effort to honor your request.

I WILL BE SHARING WITH:

Name	Telephone
Street Address	
City/State/Country/Zip/Postal Code	
Arrival Date	Departure Date

One night's room rate will be charged at the time of the booking. A major credit card must accompany this form to guarantee reservation. Changes or cancellations made to your reservation within 21 days of arrival will result in full payment of room and tax for each night cancelled. Once reservation has been confirmed, please fax any changes to the hotel. SC&RA is not affiliated with third party vendors or travel agents for any meeting—Attendees must utilize the hotel form in order to secure a room at the SC&RA group rate.

Payment Method	<input type="checkbox"/> American Express	<input type="checkbox"/> Visa
	<input type="checkbox"/> Mastercard	<input type="checkbox"/> Check
Credit card number	<input type="text"/>	Exp. Date
	<input type="text"/>	<input type="text"/>
Name as it appears on card (please print)	<input type="text"/>	
Signature	<input type="text"/>	

DO NOT DELAY in making reservations.
The closer to the meeting dates the more difficult to obtain desired accommodations.



Guaranteed check-in time is 4:00 pm
Check-out time is not later than 12:00 pm

If accommodations are available in the Group Room Block after **October 11, 2012**, requests will be filled on a space available basis only.

Mail or Fax to: Attn: Jeffrey McIntosh/Villas of Grand Cypress
One North Jacaranda, Orlando, Florida 32836
Fax: (407) 239-7219

Call in reservations will not be accepted.

REGISTRATION

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PLEASE PRINT OR TYPE

Company Name		INTERNAL USE ONLY	
Contact			ID#
Street Address			Batch
City/State/Country/Zip/Postal Code			Date
Telephone	Fax		

Please check this box if special accommodation is needed due to disability, and attach a note describing what is needed.

REGISTRANTS

	<small>✓ IF A FIRST-TIME</small>	FIRST NAME	LAST NAME	NICKNAME (for badge)	<small>✓ IF ATTENDING PRE-EVENT SESSION</small>	FEE
REGISTRANTS	1-1	Registrant				
		Email:				
	1-2	Spouse				
		Email:				
	2-1	Registrant				
		Email:				
	2-2	Spouse				
		Email:				
					TOTAL \$	

FEES	EARLY BY 10/26/12	REGULAR AFTER 10/26/12
Member Registrant <i>(Does not include Pre-Event Session)</i>	\$459	\$509
Spouse	\$319	\$369
Member Registrant <i>(Includes Pre-Event Session)</i>	\$549	\$599
Spouse	\$339	\$389
Non-Member Registrant <i>(Does not include Pre-Event Session)</i>	\$689	\$739
Spouse	\$449	\$499

All fees must be received with registration. Registrations must be received before the dates noted to receive special rate. Any registration received after October 26, will be charged the regular rate.

All cancellations must be received in writing. There will be a charge of \$50 per person for cancellations received after September 5. No refunds for cancellations received after October 26. Interest charges of one and one half percent per month will be added to delinquent accounts, together with any attorney's fees and cost of collection if necessary.



Register online at www.scranet.org/events
or send registration form with payment to:
SPECIALIZED CARRIERS & RIGGING ASSOCIATION
5870 Trinity Parkway • Suite 200 • Centreville, VA 20120
P: (703) 698-0291 • F: (703) 698-0297

Payment Method	<input type="checkbox"/> American Express	<input type="checkbox"/> Visa
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