



2019-2020 ANNUAL REPORT

# CHARTING A COURSE

Plumbing-Heating-Cooling Contractors National Association

Educational Foundation

# AT THE HELL



PHCC Educational Foundation Chairman  
**Craig Lewis**



## Dear Foundation Friends, Donors and PHCC Members:

When I set out on this journey to serve as your Foundation Chair four years ago, part of my mission was to pay it forward ... to give back to the industry that had supported my family and me by inspiring the next generation of p-h-c workers and strengthening the industry as a whole.

During my first Strategic Planning Session in 2016, we established specific goals under four pillars: Foundation Infrastructure, HVAC Training, P-H-C Career Path and Workforce Development. We had a vision, and we charted our course.

With those charts and with your generous support, the PHCC Educational Foundation's programs and resources have steered countless p-h-c professionals – and the next generation of professionals – in exciting new directions.

Just this year, we awarded \$113,000 in scholarships to apprentices, trade school students and college students. We supported 29 competitors at our Plumbing and HVAC National Apprentice Contests. We sold more than 13,000 plumbing and HVAC textbooks. We watched enrollment in our online Apprentice Program more than double. And we committed the Foundation to training 75,000 apprentices over the next five years when we signed the White House's Pledge to America's Workers. The list goes on ... I invite you to read more about this year's accomplishments within these pages.

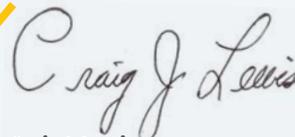
Of course, never could we have imagined a worldwide pandemic. As Oliver Wendell Holmes once said, "We must sail sometimes with the wind and sometimes against, but we must sail and not drift." So we adjusted our sails and moved on. We held our first virtual Board Meeting in May. We offered our Pre-Apprentice Training free of charge through the end of 2020 to help our contractor members attract newly unemployed people to our irreplaceable industry. We hosted live contractor discussions on "Surviving and Thriving in Times of Crises." And, we leveraged the power of online learning by adding two free COVID-19 courses for our eLearning apprentices and helping several states transform their apprentice schools to an online platform. All of this was accomplished while our staff had to work remotely.

We also never anticipated that we'd be losing one of our own – long-time Foundation supporter and the chair of our HVAC Apprentice Contest Committee, Scott Balmer. Scott was so typical of our volunteers; he had a passion for helping our young people coming into the trade and had that "can do attitude" that is so prevalent among our volunteer members. Scott will always be an example of what our volunteers do for our industry. I am very grateful to Chip Greene of Greene & Associates and Ken Nielsen of AccuAire for stepping in to steer this crucial committee moving forward.

During the past 40 years, I have made many friends through our industry and particularly through our Educational Foundation and our Association. The support I have witnessed over these past four years from our contractor members, manufacturers and, of course, our staff has been incredible. The education programs for our apprentices, superintendents and project managers – as well as our scholarships – are made possible because of the donations of time, talent and financial support from our Foundation members and partners. These programs and opportunities are all produced and executed by our great staff. Our challenge is to continue to develop programs for our industry that are relevant and dynamic for our contractor members. Our industry is in a battle to attract and educate the next generation of skilled workers and leaders. With your continued support, the Foundation is ready to provide the tools necessary for this challenge.

Taking over for me at the helm as Foundation Chair is Kevin Tindall of Tindall & Ranson Plumbing, Heating & Cooling. I leave my post grateful for your support and confident in knowing that, together with Kevin, you will be in good hands and will continue to serve as a beacon for those entering our industry and charting the next course for our beloved Foundation.

Thank you.



**Craig J. Lewis**

PHCC Educational Foundation Chairman

# CAREER AND WORKFORCE DEVELOPMENT

## A GUIDING LIGHT



Everyone needs a little help to get to where they're going. With your support, the Foundation is able to serve as that beacon, guiding emerging p-h-c professionals today ... with the hope that someday they'll create a safe harbor for those who follow.

### SCHOLARSHIP PROGRAM

*Pointing the Future of Our Industry in the Right Direction*

In 2019, the Educational Foundation proudly awarded \$113,000 in scholarships to 50 deserving students.



Connected in quality.

Special thanks to Viega for providing an additional \$10,000 in scholarships for 2019.

Also this year, the Foundation established the Jim Finely Memorial Scholarship and Patty Jones Memorial Scholarship.



*"I cannot begin to express the gratitude I have for being awarded this scholarship. It is such a blessing and I am so grateful. Thank you for investing in my education and future career."*

— BLAKE JACKSON,  
Scholarship Recipient



*"I want to sincerely thank you for the scholarship and the plumbing tools awarded to me. Both will go a long way in supporting me throughout my education and career."*

— JOHN "JACK" BAUER,  
Scholarship Recipient

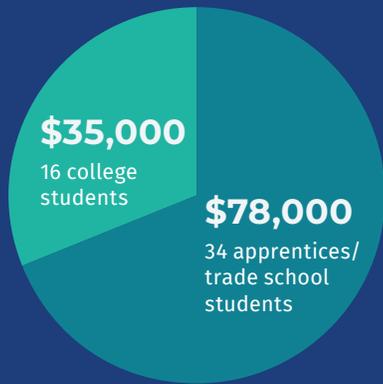
**LOOK AT WHERE THIS PAST SCHOLARSHIP RECIPIENT IS NOW!**

What a difference eight years makes! It was 2012 when Tyler Arndt received a PHCC Educational Foundation scholarship. Two years later, he won the PHCC Educational Foundation's Plumbing Apprentice Contest ... and he has since returned twice to *judge* that national contest. Today he's PHCC of Wisconsin's youngest president. Your support helped jumpstart Tyler's career ... and now he's an expert in his craft and is paying it *forward!*

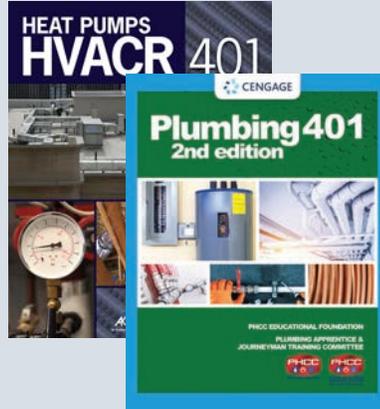


**2019 SCHOLARSHIPS**

**\$113,000**  
IN SCHOLARSHIPS TO  
**50** DESERVING  
STUDENTS



All applicants for Foundation scholarships must be pursuing post-secondary education/training directly related to the p-h-c industry.



**PLUMBING AND HVAC TEXTBOOKS**

*Equipping Students and Instructors With the Latest Information*

This year alone, the Foundation sold more than 13,000 plumbing and HVACR textbooks.

## WOMEN, WORKFORCE AND WISDOM

### *Sharing Best Ideas*

During CONNECT 2019 in Indianapolis, Indiana, the Educational Foundation co-sponsored a “Women, Workforce and Wisdom” panel discussion, bringing together several powerful female leaders to share their best ideas on how to get involved – and stay involved – within their industry and in their communities.



## NATIONAL APPRENTICE CONTESTS

### *Watching Our Future Take the Wheel!*

Also during CONNECT 2019, the Foundation’s National Apprentice Contests gave 19 plumbing apprentices and 10 HVAC apprentices a national stage on which to show off their skills, hone their craft and compete for top prizes. We’re so grateful to all the sponsors and volunteer committee members who made these contests possible. A special thanks to Milwaukee Tool, which donated most of the tools needed by the contestants this year ... allowing them to avoid the hassle of shipping their own tools for the competition and go home with a brand-new set of tools!

To ensure the good work of these contests continued after we left our host city, the Foundation donated many of the materials used to the Greater Indy Habitat for Humanity.

*“I wanted to thank you and the entire PHCC crew for such a great experience. I’m more than grateful that I had the opportunity to compete and have such a memorable experience. I also know that this wouldn’t be possible without you and many others working hard and also volunteering time to make the apprentice contest such a great event each year. I had a great time, learned a lot, and met a lot of great people.”*

– CHRIS REDFERN  
Winner, 2019 Plumbing  
Apprentice Contest

# THANK YOU, PHCC'S BAYSHORE NEW JERSEY CHAPTER!

## BAYSHORE CHAPTER GIFT

*Helping Vo-Tech  
Students Tap Into  
Online Apprenticeship  
Training*

The Foundation received an incredibly generous \$53,000 contribution from PHCC's Bayshore New Jersey Chapter when it was winding down operations and decided to use the balance of its funds to support our apprenticeship training programs. We're now putting these funds to work ... giving high school students at the Somerset County Vo-Tech School in New Jersey access to the Foundation's online apprenticeship training. Thank you!



**\$53,000**  
IN CONTRIBUTIONS

**PLEDGE TO**   
**AMERICA'S**  
**WORKERS**



### **COMMITTING TO TRAIN 75,000 PEOPLE**

At an exclusive ceremony at the White House in January, the Foundation signed a pledge committing to train 75,000 people through its plumbing and HVAC apprenticeship programs over the next five years. The pledge placed PHCC in the top 10% of private sector organizations, including top-name Fortune 500 companies, that have made this commitment.

# EDUCATION AND TRAINING

## CHARTING A COURSE

Those in our industry depend on the Foundation's reliable technical tools and proven management education to help them navigate the waters of our changing industry. Thanks to you, our programs are recognized as "the standard" in our profession.

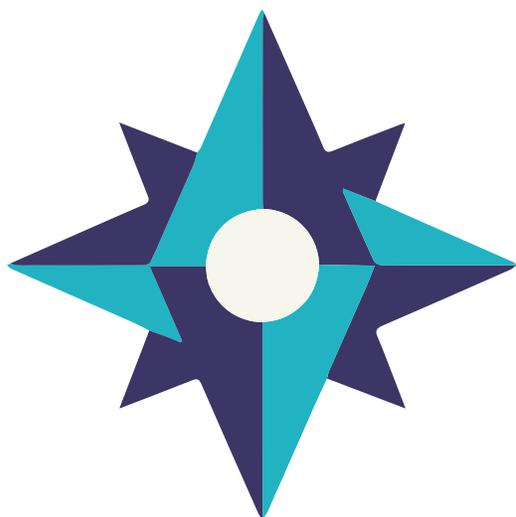
### PHCC ACADEMY GROWTH

#### **CASTING A WIDER NET**

Just this year, enrollment in the Foundation's Online Apprentice Training again more than doubled, reinforcing that this flexible program is accommodating

our industry's changing education needs. It's also going the distance in helping PHCC chapters grow their memberships (some chapters crediting it with helping them *triple* their numbers!).

Take a look at which states are currently onboard and consider establishing a program in your area!



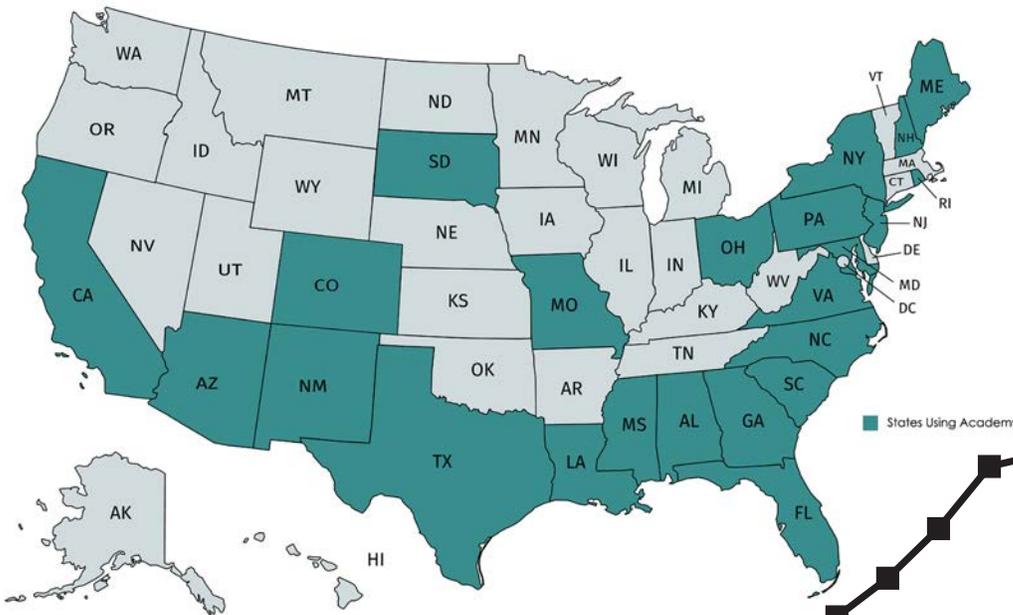
### FAST TRACK TO SERVICE PLUMBING

#### **WITHIN OUR SIGHTS!**

A training course *for* service contractors developed *by* service contractors, the Foundation is launching its highly anticipated Fast Track to Service Plumbing course this fall. With more than 30 modules, an e-book and a supervisor's guide, this comprehensive program will provide business owners with a program to train safe, efficient and job-ready technicians.

We've completed course development work and are ready to hit the water soon! This revamped program – originally developed by Quality Service Contractors (QSC) – now incorporates interactive components, videos, voice-overs, online quizzes and more. Prepare for the ultimate experience in education!

States that are using our online program



States Using Academy

*"At GSM, we see that the online apprenticeship program is changing our company for the better. This program is helping us recruit more and more higher quality young people into our business while also helping us train and retain them better than anything we have ever done."*

– JOEL LONG  
GSM Services, North Carolina



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QUARTERLY ENROLLMENT GROWTH 2014-2019



**UPDATED ONLINE PRE-APPRENTICE COURSE**

**ON THE HORIZON**

Coming in 2021, the Foundation will be giving our popular Pre-apprentice Course a refresh and launching three new online courses on construction math, plumbing for non-plumbers, and calculating overhead and profit.

THE BOLD LOOK OF **KOHLER**

**KOHLER SEMINAR SERIES**

**VALUABLE EDUCATION, THANKS TO A SUPPORTIVE FIRST MATE**

The Foundation continued to sponsor business management education for PHCC chapters, Quality Service Contractors (QSC) and the Association Executives Council (AEC), thanks to sponsorships from Kohler, which has been sponsoring our Seminar Series since 2000.



**OVERHEAD AND PROFIT CALCULATOR**

**CALCULATING REAL COSTS AND SELLING AT THE RIGHT PRICE**

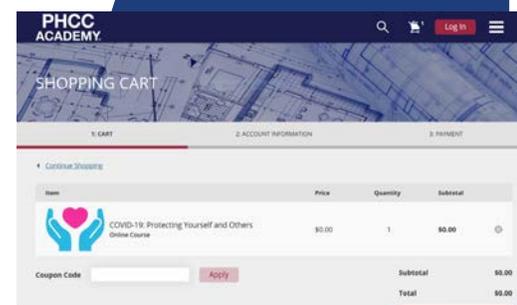
Thank you, A. O. Smith! With your generous sponsorship, the Foundation fulfilled more than 700 requests for the PHCC Overhead & Profit calculator this year (and our YouTube video on this valuable tool now has nearly 14,000 views!).

# COVID ADJUSTING THE SAILS

When a global pandemic shifted us off course, we rallied our crew to respond to the current needs of our p-h-c community and adjusted the sails to leverage this crisis into an opportunity to promote our essential industry.

## HOW WE RESPONDED:

- ▲ The Foundation **added two courses** – “COVID-19: Protecting Yourself and Others” and “COVID-19: Your Workplace” – for our eLearning apprentices. Provided by our LMS provider, Absorb, these courses also were available in Spanish.
- ▲ We helped our PHCC member contractors **recalibrate their businesses** with our free software tools, including the Foundation’s:
  - Overhead and Profit Calculator
  - Lost Time Calculator
  - Revenue/Forecasting/Projections Spreadsheet
  - Risk Analysis Matrix
  - Financial Ratios Check-up
- ▲ When several PHCC chapters found themselves unable to hold their in-person apprenticeship classes, the Foundation helped them **go virtual** using our Online Apprentice Training. As an example, in just three weeks, Foundation staff assisted PHCC of San Antonio in securing the necessary state approvals to shift their classroom training to the online program.
- ▲ To help attract the millions of newly unemployed people looking for their next line of work, the Foundation **offered our Pre-Apprenticeship training free of charge** through the end of 2020. That popular decision is paying off ... to date, more than 400 new students have enrolled!
- ▲ Providing some flexibility during these challenging times, the Foundation’s Scholarship Committee **adjusted our 2020 scholarship program requirements** so that *part-time* apprentices and past winners could apply.
- ▲ Sadly, the SkillsUSA National Championship was cancelled this year because of COVID. This would have been our last year in Louisville, Kentucky, and we thank all the welcoming, accommodating people who worked tirelessly to make SkillsUSA a success these past few years. We’ll start 2021 moving more than 30 crates, 16 pallets and 2 skids to our next host city of Atlanta, Georgia!
- ▲ Because of the pandemic, we also had to cancel our sold-out “Essentials of Project Management” course and our “Creating Super Foremen” workshops this year.



## SPREADING THE WORD

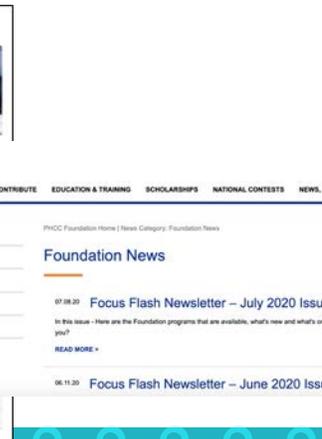
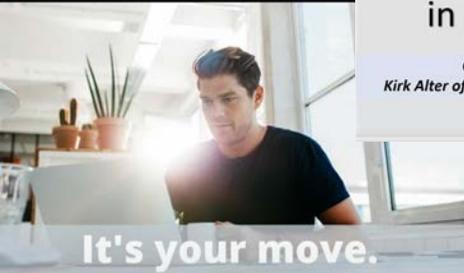
Of course, changing times call for the need for instant communication, and this year (more than ever!) we relied on our print, online and social media channels to get the word out ... fast! Thank you for supporting our *Focus* and *Focus Flash* newsletters, as well as our ability to quickly share news and stories via Facebook, Twitter and YouTube.

## SURVIVING AND THRIVING IN TIMES OF CRISES

Instructor Kirk Alter of Fast Management and Purdue University hosted this popular 10-week seminar series, focused on protecting businesses and helping contractors find new opportunities. These free sessions gave attendees a valuable platform on which to share information and tools, helping each other through the COVID crisis.

*"I truly appreciate what you and Kirk are offering to our industry. These sessions have been incredible, and Brad and I are so happy to be part of an amazing organization."*

– NICK DAVIS  
MSD, Inc., Dayton, Ohio



# FUNDRAISING AND DEVELOPMENT

## SUPPORTING THE VOYAGE



It takes a dedicated crew to ensure that the future of our treasured industry is in skilled hands. With each gift and each person onboard, we can continue to enhance the growth and success of the plumbing and HVACR industry workforce ... and protect the health and safety of all. Thank you.

### ENDOWMENT AND SCHOLARSHIP FUNDS

Generous gifts to our Endowment and Scholarship funds keep our programs going. Just this year, our major donors added more than \$208,000 in new contributions to these funds.

The PHCC Educational Foundation is a 501(c)(3) non-profit, with the majority of our monetary support provided by more than 100 contractors, manufacturers, and industry partners whose generous gifts helped to establish the Foundation's Endowment Fund. These major donors form the core membership of our committees and are recognized as our Board of Governors.



**YOU MAKE WHAT  
WE DO POSSIBLE!**

**\$208,000+**  
**IN NEW GIFTS TO THE  
ENDOWMENT AND  
SCHOLARSHIP FUNDS**



## THE 2019 INVEST IN YOUR FUTURE CAMPAIGN

We asked you to keep our nation on the fast track, and you delivered, **exceeding our \$170,000 goal by more than \$18,000!**



## 2020: UNITING TO ENSURE THE FUTURE OF OUR TRADE AND OUR NATION

Whatever circumstances we are facing, our mission remains to help contractors and their employees improve their success through educational opportunities. To fulfill that mission, we raised the goal of our 2020 Invest in Your Future Campaign to \$175,000. With your contributions – and with matching funds from our friends at InSinkEratator, Bradford White, Ferguson, Kohler, A. O. Smith, Federated Insurance, Rheem, Viega and NIBCO – we can make that happen!



## NEW THIS YEAR

To make the most of our fundraising opportunities, this year the Foundation:



**\$23,000  
IN ONE HOUR**

**Invited donors at the CONNECT 2019 Awards Luncheon** to link to a mobile-friendly contribution form, with their gifts displaying at the event in real time. More than \$23,000 was raised through this mobile giving system ... most of it in just one hour!



**Participated in #GivingTuesdayNow** in May, raising more than \$12,000.

**\$12,000  
IN MAY**



**Purchased new fundraising software** – Network for Good – which manages donor data and communications.



**Created the Legacy Circle** to recognize donors who name the Foundation as a beneficiary of a planned gift.

# BALANCE SHEET

**JUNE 30, 2019**

	2019	2018	Variance
<b>ASSETS</b>			
<u>Current Assets</u>			
Cash & cash equivalents	\$305,839	\$85,384	\$220,455
Accounts Receivable	44,794	48,668	(\$3,874)
Pledges Receivable	164,728	162,250	\$2,478
Prepaid Items	2,976	14,868	(\$11,892)
TOTAL CURRENT ASSETS	518,337	311,170	\$207,167
Investments at Market Value*	12,367,260	12,283,106	\$84,154
TOTAL ASSETS	\$12,885,597	\$12,594,276	\$291,321
<b>LIABILITIES AND NET ASSETS</b>			
<u>Liabilities</u>			
Accounts Payable & Accrued Expenses	\$115,412	\$89,465	\$25,947
Due to Affiliate	16,350	109,837	(\$93,487)
Deferred Revenue	128,650	59,625	\$69,025
TOTAL CURRENT LIABILITIES	260,412	258,927	\$1,485
<u>Net Assets - Prior Year</u>			
Undesignated - Operating	561,101	482,549	\$78,552
Scholarships	1,468,845	1,397,059	\$71,786
Temporarily Restricted	5,186,659	4,819,231	\$367,428
Permanently Restricted	5,118,744	4,880,423	\$238,321
TOTAL PRIOR YEAR NET ASSETS	12,335,349	11,579,262	\$756,087
Change in Net Assets	289,836	756,087	-466,251
TOTAL NET ASSETS	12,625,185	12,335,349	289,836
TOTAL LIABILITIES AND NET ASSETS	\$12,885,597	\$12,594,276	\$291,321



## BOARD OF DIRECTORS

### OFFICERS

#### Foundation Chairperson

##### Craig Lewis

R.E.C. Industries Inc.  
Bryan, TX

#### Foundation Vice-Chairperson

##### Kevin Tindall

Tindall & Ranson Plbg & Htg  
Princeton, NJ

#### Foundation Secretary-Treasurer

##### Patrick Wallner

Wallner Plumbing  
Company, Inc  
Redding, CA

### DIRECTORS

#### Keith Bienvenu

Bienvenu Brothers Plumbing  
Harahan, LA

#### Hunter Botto

Botto Brothers Plumbing & Heating  
Bradenton, FL

#### Jan Bray

Bray Strategies  
Denver, CO

#### Michael Copp

PHCC – National Association  
Falls Church, VA

#### Rob Grim

InSinkErator  
Racine, WI

#### Ray Jones

Raven Mechanical  
Houston, TX

#### Joel Long

GSM Services, Inc.  
Gastonia, NC

#### Jonathan Moyer

Cocalico Plumbing & Heating  
Denver, PA

#### Ann Rivers

Rivers Plumbing, Heating & Air  
Pleasanton, CA

#### Steve Rivers

Rivers Plumbing, Heating & Air  
Pleasanton, CA

#### Nicole Urizzo

NJ PHCC  
Red Bank, NJ

#### Ivan Zimmerman

Zimmerman Electrical &  
Plumbing, Inc.  
Ephrata, PA

### CHIEF OPERATING OFFICER

#### Cindy Sheridan, CAE

PHCC Educational Foundation  
Falls Church, VA

## BOARD OF GOVERNORS

### CHARTER FOUNDERS

American Standard  
Delta Faucet Company and the  
Masco Family of Companies  
InSinkErator  
Kohler Company

### Program Underwriter

Eljer Plumbingware, Inc.

### Chancellor

Moen Incorporated  
Viewpoint Construction Software

### CORPORATE FOUNDERS

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Anvil International  
Bradford White Corporation  
Cerro Flow Products, Inc.  
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Elkay Manufacturing Company  
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Legend Valve  
Milwaukee Tool  
NIBCO INC.  
Rheem Manufacturing Co.  
and Ruud Water Heater  
Trimble MEP  
Viega LLC.  
Watts Water Technologies, Inc.

### CONTRACTOR MEMBERS

Kirk and Pam Alter  
William Becker\*  
Joseph Beetz\*  
Irwin Botto†\*  
Daniel Burnett†\*  
Steve Carder  
John “Tim” Ceren\*  
Laurie and Danny Crigler  
Ray† and Connie Dauenhauer\*  
Ray Dauenhauer, Sr.† (Memorial)  
James T. Driscoll, Jr.  
David and Janet Dugger  
Charles “Red” Englert†\*  
Richard E. Farrell\*  
David† and Jean Fox†\*  
John Garvelink  
Mary Garvelink

Mark Giebelhaus  
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James Hansbauer\*  
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Richard R. Kerzetski  
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William† and Bettet Trombly\*  
John† and Jo Wagner  
Patrick Wallner  
John† and Kate Ward\*  
Rick and Bonnie Whitaker  
Francist and Anne Williams\*  
Franklin Youngblood†\*  
F. Carl Zieglert  
F. Kent Ziegler  
R. Scott Ziegler

\* Founder  
† Deceased



**EDUCATIONAL FOUNDATION**

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Educational Foundation**  
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