



STRONGER

2020/2021 ANNUAL REPORT

PLUMBING-HEATING-COOLING CONTRACTORS NATIONAL ASSOCIATION

EDUCATIONAL FOUNDATION



EDUCATIONAL FOUNDATION

STRONGER TOGETHER



Dear Foundation Friends, Donors and PHCC Members:

As many of you know, Kathy and I have had a long journey with PHCC over the last 30 years, and in that time we have made many new friends ... countless connections with volunteers, sponsors, partners, and Foundation staff and Board members, among others.

In many organizations, there is a lot of *talk* about making a difference. At the PHCC Educational Foundation, we really *make* a difference, and we do it time and again. Even when a worldwide pandemic presented challenges this year to motivate, educate or simply even communicate, the incredible people behind our Foundation's efforts didn't miss a beat in helping shape the future of our essential industry.

Because of people like you who "walk the walk," we inspired and supported 55 apprentices and college students with \$112,000 in scholarship awards. We hosted a virtual SkillsUSA Plumbing Championship. We offered our Plumbing and HVAC Readiness Course free of charge to those looking to make a decision about a career in our industry. We truly helped build tomorrow's workforce.

Who would have thought it was possible to get even *stronger* during this unprecedented year, but we did! Most notably, more students than ever experienced the power of our PHCC Academy online learning platform, with enrollment *more than doubling* since 2019! Among our elearning opportunities, this year we launched our much-anticipated Fast Track to Service Plumbing course, quickly and safely training plumbing employees to be job-ready in service and repair.

2020-2021

We also proved to be a pillar of strength to contractors looking to keep their managers skilled and productive. Of all years, this was the one to learn how to be adaptable and open to new solutions. The Foundation didn't let COVID crash that opportunity, offering two virtual Essentials of Project Management courses and two Super Foreman training classes.

While getting young people into the industry remains one of our biggest challenges, we as an organization have thrived because of the foresight of our past leaders to adapt a training process that allowed our members and technicians to get world-class education online. To the members leaving our Board of Directors – including ex officio members Hunter Botto, Joe Cornetta, Ann Rivers and Wayne Thomas – thank you for your tireless service.

I also want to personally thank my predecessor, Craig Lewis, who graciously stepped in to take the second year of Patrick Wallner's secretary-treasurer position, keeping our leadership team intact as we were facing a lot of uncertainty. Ensuring we *stay* strong, current Board member Steve Rivers is moving up to the secretary-treasurer position, and Jonathan Moyer joins our Board. In addition, Elisabeth Sutton with Kohler will replace Rob Grim of InSinkErator as our manufacturer member on the Board. Welcome!

Just like the knot on the cover of this Annual Report, these passionate people – as well as the Foundation staff members and all the organizations and people like you who continue to support this worthy Educational Foundation – are tough, flexible, and dependable. We have been put to the test this year ... and we have emerged stronger than ever.

It is an incredible honor that you have entrusted me to lead this Foundation ... thank you. As contractors, you and I understand that education gave us the ability to be successful as individuals and as professionals. Now, as we continue in our careers, it is essential that we *give back* to this industry and train the next generation to be the best *they* can be. I urge you to help us as an organization achieve this goal, securing the future success of our industry.

We at the Foundation seem to have an unbreakable bond, connected by a passion to protect and promote our worthy profession. I am so grateful for each and every one of you.



KEVIN TINDALL

PHCC EDUCATIONAL FOUNDATION CHAIRMAN



CONNECTIONS

CAREER AND WORKFORCE DEVELOPMENT

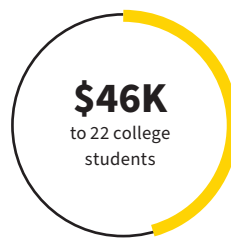
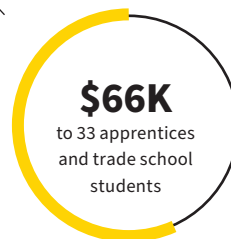
Because of you, we're connecting tomorrow's workforce with the people, resources and experiences they need today. Everyone needs to start somewhere; let it be here, knowing that, as these promising p-h-c professionals are building their careers, we're building our industry's future.

SCHOLARSHIP PROGRAM

Building the Pipeline

In 2020, the Educational Foundation impacted the lives of 55 apprentices and college students, proudly awarding a total of \$112,000 in scholarships.

\$112K
IN SCHOLARSHIPS



All applicants for Foundation scholarships must be pursuing post-secondary education/training directly related to the p-h-c industry. Because of COVID, the Scholarship Committee changed the 2020 application rules, inviting part-time apprentices and past scholarship winners to apply; the Foundation received 134 applications.

“

“It is an honor to receive a scholarship from the PHCC Education Foundation. I deeply appreciate the contribution that the PHCC Foundation has made to my education as well as all of the work that they have done to help other students further their education.”

Joseph Bertrand

Mechanical Engineering

North Carolina Agricultural and Tech State University



RECIPIENT



SKILLSUSA PLUMBING CHAMPIONSHIP

Maintaining the Standards ... Virtually!

Once again, the Educational Foundation supported the SkillsUSA plumbing competition this year, held virtually in June because of COVID restrictions. This was the 57th annual event for the world's largest showcase of skilled trades. Four top students received honors in the plumbing competition. The Foundation thanks our SkillsUSA Plumbing Technical Committee, which worked within a variety of constraints to develop a challenging contest representing our high industry standards.

HIGH SCHOOL STUDENTS

Getting Them Career-Ready

When the pandemic hit last year, everything changed. And yet high school students studying plumbing and HVAC at BOCES Barry Tech in Westbury, New York, didn't miss a beat. In fact – with a little help from the PHCC Educational Foundation – they're coming out of their high school experience with *three* PHCC certifications – from our Workforce Readiness course as well as from our Plumbing 101 and HVAC 101 Apprenticeship courses – to add to their résumés! With your help, we also were able to make a donation toward their supplemental textbooks. Thank you!



PHCC APPRENTICES

Hearing Their Passion

While the 2020 PHCC Educational Foundation National Plumbing and HVAC Apprentice Contests were cancelled because of COVID, we didn't let that stop us from witnessing a group of past and present PHCC apprentices in action. In a video produced by the Foundation, these young professionals share why they chose a career in the p-h-c profession.

Go to phccareers.com/real-professionals/ to view the video and hear the pride and passion for their work in their voices!

TRUST EDUCATION AND TRAINING

With your support, the Foundation continues to set the standard on technical training and management education. When we know we can rely on you, countless professionals can depend on us.

THE ADVANTAGES OF eLEARNING

Stronger Than Ever!

In recent years, enrollment in the Foundation's online training courses has skyrocketed, reinforcing that this flexible program is accommodating our industry's changing education needs. Of course, the pandemic only *accelerated* the adoption of online training across the country, and the PHCC Academy became the training solution of choice for many contractors to train their new workers and apprentices.

Since the PHCC Academy launched in 2017, we've had more than 3,500 course enrollments. That's your support making a big difference in the industry we share!

PHCC of Florida is one of the latest PHCC chapters to get on board with the Foundation's online apprentice training program - PHCC Academy.



"Success in our mission here at PHCC of Florida means delivering value to our members. The PHCC apprenticeship program is uniquely designed to offer that value and create the opportunity for the professional growth of our future leaders in today's challenging work environment."

Jim Kistler

PHCC of Florida Executive Director



THE PATH BEST CHOSEN

Repaving the Course for Prospective P-H-C Professionals

The Foundation recently repositioned our PHCC Academy course offerings – and added a new course – to move students through at the correct level in their careers to get them to be licensed professionals ... *and* to give the contractors that employ them effective and efficient training at a reasonable price.

Workforce Readiness

To attract more people into our essential industry, the Foundation chose to offer this course – an introduction to the p-h-c profession – free-of-charge during the pandemic. It worked! Since the onset of COVID, we've enrolled more than 1,000 students from all 50 states and three countries outside of the United States.

Plumbing and HVACR Apprenticeship provide the required technical instruction for a four-year apprenticeship program and train apprentices as a pathway into journeyman or master plumbing training. This year, we also started an update on our Plumbing 401 online apprentice course to bring it in line with our *Plumbing 401, 2nd edition* textbook. This industry never stops evolving... and neither do we!

Pre-Apprentice

This new 90-day course – available at an affordable introductory rate – is designed to help students diversify their skillset as helpers and prepare them for success in a suitable Fast Track or Apprenticeship training program. With very little investment, contractors have the opportunity to see if a new hire is a good fit for elearning... and in their company culture.

Fast Track to Service Plumbing

Comprehensive entry-level training – designed for contractors, by contractors – Fast Track is for employees who perform residential or commercial plumbing service and repair work. After a soft launch in late 2020, the Foundation officially launched Fast Track this year, offering it through our PHCC chapter elearning partners, just as we do our apprenticeship courses.

As of June 2021, we've already enrolled more than 80 students! As a bonus, the Foundation is directing \$50 from each sale of a Fast Track course into our Scholarship Fund.

“Our industry has a shortage of trained professionals. Running help wanted ads doesn't help. We have to train the next generation of professionals ourselves. The PHCC Educational Foundation helps us all by helping to train the next generation.”

David Ariano

PHCC Educational Foundation Donor
Ravinia Plumbing and Heating Co.





CONSTRUCTION MANAGEMENT COURSES

Zooming In. Continuing the Learning.

The Foundation's management workshops have a reputation for being intensive and highly interactive, and COVID wasn't about to change that. Thanks to sponsorships from A. O. Smith and Kohler Company, we still hosted two Essentials of Project Management workshops this year, with popular instructor Kirk Alter delivering his energetic style in person – while students participated virtually – through the use of A. O. Smith University's studio.

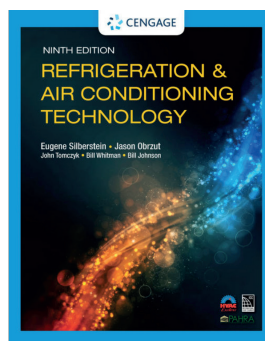
- Also sponsored by A. O. Smith and Kohler Company, the Foundation hosted two virtual **Creating Super Foremen** workshops this summer, with Kirk Alter helping these foremen learn how to carefully craft a game plan and win at the construction project game.
- And, Alter turned his popular 10-week **Surviving and Thriving in Times of Crisis** virtual conversations into a two-part session during PHCC's virtual PHCCCONNECT2020, where attendees learned how to interpret and analyze industry data and prepare for what's coming next.

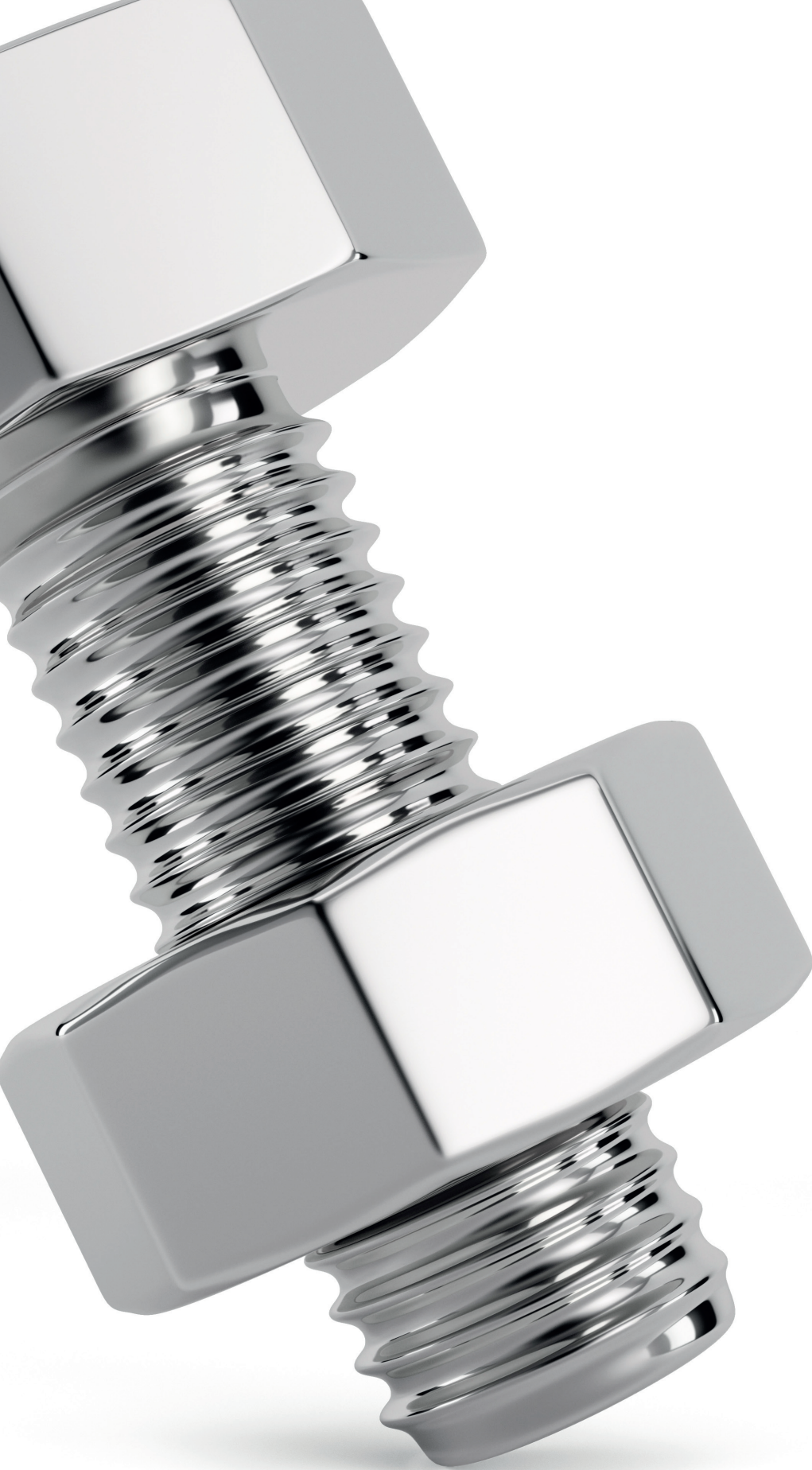
Textbooks

This year alone, we sold more than 11,600 Plumbing and HVACR textbooks. And, HVAC instructors and contractors selected *Refrigeration and AC Technology* as PHCC's new recommended HVACR textbook.

11.6K

TEXTBOOKS SOLD





Plumbing Assessment Tests

Designed as course-end assessments for each year of apprenticeship in a traditional four-year program, the Foundation's Plumbing Assessment Tests gained a lot more interest this year to make sure students are entering the correct year for their coursework.

Seminar Series

With support from Kohler Co., the Foundation didn't miss a beat, continuing – even during a pandemic – to help PHCC chapters provide high-quality business management education, both virtually and in person as chapters started to re-open their doors. Through this seminar series, we also supported PHCC's Association Executives Council (AEC) by sponsoring speakers for its monthly talks and virtual Spectrum Conference.

Overhead and Profit Calculator

With a generous donation from A. O. Smith, the Foundation continues to offer the PHCC Overhead & Profit calculator ... free of charge! Says Mohannad Halaweh: "I found your [Overhead and Profit] spreadsheet on YouTube, and I've fallen in love with it. Thank you for creating it ... I commend the Foundation!"

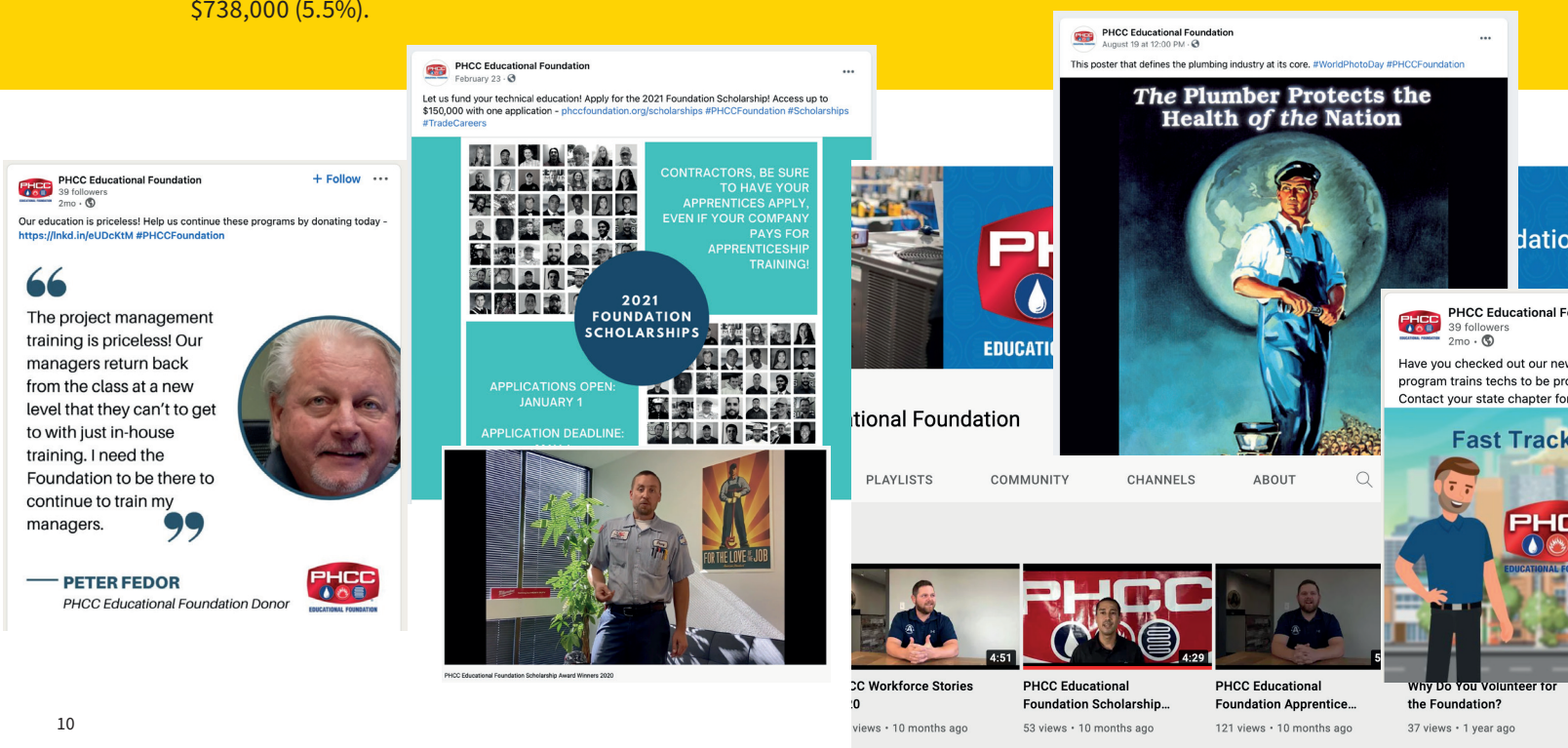
WHAT'S NEXT? FLEXIBILITY

The Foundation has a reputation for staying relevant – and even *anticipating* needs – because we know how to adjust to new ideas and challenges. Thanks to you, we continue to prepare for what's coming.

STAYING STRONG

As a pillar of strength for all the students, project managers and contractors that depend on the PHCC Educational Foundation to provide them with quality, relevant and consistent training, *we know we can never sit idle*. Just this year the Foundation's Board of Directors met to discuss how to expand its services to better support the HVAC industry. Among the decisions:

- The Foundation's Board voted to move forward with creating a plan to expand educational offerings to HVAC contractors and the industry that are comparable to the career development services we offer plumbing contractors.
- The Foundation's Investment Management Committee voted to recommend to our Board of Directors – and the Board approved the motion – that we liquidate \$500,000 in equities to invest in further development of the HVAC education program. This came after a review of our Q4 2020 performance, showing that, since year-end, the ECIC fund was up \$738,000 (5.5%).



PUTTING MORE ON OUR SHOULDERS

Because of the good returns on our investments – and the Board’s commitment to reinvest in our courses – the Foundation will embark on a multi-year plan to *update* our four-year online plumbing apprentice courses as well as *develop* new four-year online HVAC apprentice courses using the new recommended HVACR textbook, *Refrigeration and AC Technology*. All new and updated courses will include voice-overs and some of the same instructional design and interactivity as our Fast Track to Service Plumbing course ... providing the ultimate experience in education!

WE KNOW
WE CAN NEVER
SIT IDLE.



SPREADING OUR WORD

Of course, a worldwide pandemic only *heightened* our need to communicate swiftly and frequently, relying heavily on our online *Focus Flash* newsletter (emailed monthly), as well as on our social media channels – LinkedIn, Twitter, YouTube and Facebook.

And we’re excited to reveal a redesign of our printed *Focus* newsletter ... coming with the first edition of 2022. Watch for it!

FUNDRAISING AND DEVELOPMENT STRENGTH

There's only one way we can continue to assess needs, advance careers, build businesses and ensure that the future of our industry is in skilled hands ... with YOU. Thank you for investing in us. Every dollar makes us stronger.

THE SUPPORT NEVER STOPPED

Breaking Records!

Even though the Foundation couldn't host live events this year, manufacturers and contractors realized that our impact on filling the workforce shortage and training our industry's essential professionals is more important than ever! As a result in 2020 ... fundraising hit an all-time high of \$396,000!

\$396K

TOTAL FUNDS
RAISED



RAISED IN GENEROUS GIVING AND
REALLOCATED SPONSORSHIPS

FLATTEN THE CURVE!

We thank YOU for realizing that there was no time like this past year to make a world of difference. With your support, our 2020 Invest in Your Future Campaign – Flatten the Curve! – exceeded our goal of \$175,000 by more than \$30,000. With generous giving (and reallocated sponsorships from events cancelled due to COVID), we ended the year with a total of \$206,889 raised!

We couldn't have exceeded our goal without matching funds from our friends at InSinkErator, Federated Insurance, Ferguson, Bradford White, Kohler, NIBCO and Viega. And, those making a gift of at least \$500 received a pack of limited-edition "Flatten the Curve" face masks, courtesy of PHCC leaders Joel Long and Hunter Botto. Thank you!



THE CORPORATE SPONSORS WHO STUCK WITH US IN 2020

As COVID shut down many of the in-person events we had planned for the year, our corporate sponsors stood firm in their support of the Foundation and our educational mission. Thank you to the companies shown here that made the decision to keep the funding going in 2020!



\$185K

GOAL FOR 2021

2021 INVEST IN YOUR FUTURE CAMPAIGN

Training the workforce of the future is our industry's challenge, and – with contributors like you – we're facing that challenge head on. Every gift made is boosted with matching funds from InSinkErator, Ferguson and Moen, plus A. O. Smith, Bradford White, Federated Insurance, the International Code Council, Milwaukee Tool, NIBCO, Rheem, Scorpion, and Viega. This year we've raised our goal to \$185,000 ... let's make this happen!

Speaking of the Board of Governors, we're excited to welcome new members:

Jonathan and Susan Moyer.

A 35-year veteran of the industry who has been actively involved in PHCC at the local, state and national levels, 2019-2020 PHCC—National President Jonathan Moyer owns and operates Cocalico Plumbing & Heating in Denver, Pennsylvania. Jonathan serves on the Foundation Scholarship Committee and is joining the Foundation Board in October for a two-year term.

\$190K

IN NEW GIFTS

ENDOWMENT AND SCHOLARSHIP FUNDS

Generous gifts to our Endowment and Scholarship funds keep our programs running. In 2020, our major donors added more than \$190,000 in new gifts 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 together serve as our Board of Governors.

Jim and Sandy Stack.

Jim and Sandy Stack are long-time supporters of the Foundation; Jim is also past PHCC – National President and Sandy served two terms as National Auxiliary President. Retired from Stack Plumbing in Kirkland, Washington, Jim also is a past PHCC—National President, and both Jim and Sandy served as National Auxiliary President twice.



Jonathan and Susan Moyer

Jim and Sandy Stack

BALANCE SHEET FOR 2020

JUNE 30, 2020

	2020	2019	Variance
ASSETS			
<u>Current Assets</u>			
Cash & cash equivalents	\$388,196	\$305,839	\$82,357
Accounts Receivable	25,395	44,794	\$(19,399)
Pledges Receivable	131,908	164,728	\$(32,820)
Prepaid Items	22,598	2,976	\$19,622
TOTAL CURRENT ASSETS	568,097	518,337	\$49,760
Investments at Market Value*	12,933,033	12,367,260	\$565,773
TOTAL ASSETS	\$13,501,130	\$12,885,597	\$615,533
LIABILITIES AND NET ASSETS			
<u>Liabilities</u>			
Accounts Payable & Accrued Expenses	\$92,897	\$115,412	\$(22,515)
Due to Affiliate	73,610	16,350	\$57,260
Payroll protection plan loan	102,623	-	\$102,623
Deferred Revenue	165,947	128,650	\$37,297
TOTAL CURRENT LIABILITIES	260,412	258,927	\$1,485
<u>Net Assets - Prior Year</u>			
Undesignated -Operating	777,201	561,101	\$216,100
Scholarships	1,444,763	1,468,845	\$(24,082)
Temporarily Restricted	5,115,486	5,186,659	\$(71,173)
Permanently Restricted	5,287,735	5,118,744	\$168,991
TOTAL PRIOR YEAR NET ASSETS	12,625,185	12,335,349	\$289,836
Change in Net Assets	440,868	289,836	151,032
TOTAL NET ASSETS	13,066,053	12,625,185	440,868
TOTAL LIABILITIES AND NET ASSETS	\$13,501,130	\$12,885,597	\$615,533



BOARD OF DIRECTORS

OFFICERS

Foundation Chairperson

Kevin Tindall

Tindall & Ranson Plbg & Htg
Windsor, NJ

Foundation Vice-Chairperson

Patrick Wallner

Wallner Plumbing Company, Inc
Redding, CA

Foundation Secretary-Treasurer

Craig Lewis

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

DIRECTORS

Keith Bienvenu

Bienvenu Brothers Plumbing
Harahan, LA

Hunter Botto

Botto Brothers Plumbing & Heating
St. Petersburg, FL

Jan Bray

Bray Strategies
Denver, CO

Michael Copp

PHCC – National Association
Falls Church, VA

Joe Cornetta

Cornetta Brothers, Inc.
Elmont, NY

Dave Frame

Bob Frame Plumbing Services Inc.
South Bend, IN

Rob Grim

InSinkErator
Racine, WI

Ray Jones

Raven Mechanical
Houston, TX

Joel Long

GSM Services, Inc.
Gastonia, NC

Ann Rivers

Rivers Plumbing, Heating & Air
Pleasanton, CA

Steve Rivers

Rivers Plumbing, Heating & Air
Pleasanton, CA

Wayne Thomas

PHCC of Massachusetts
Braintree, MA

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

Anaheim Manufacturing
Anvil International
Bradford White Corporation
Cerro Flow Products, Inc.
Charlotte Pipe and Foundry
Elkay Manufacturing Company
Federated Mutual Insurance
Ferguson and Wolseley, plc.
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 Burnette†*
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

John Giolitto†*
James Hansbauer*
William L. Harvey*
Charles F. Hiley, Sr.†*
Charles F. Hiley, Jr.†*
Larry W. Howe*
Dick and Patty Irwin*
William and Patty† Jones*
Gerard J. Kennedy
Richard R. Kerzetski
Kenneth E. Krauska†*
Craig and Kathy Lewis
Jim and Patricia Lewis
William Linek*
Joel and Renee Long
William Lynch†*
Frank and Iris Maddalon
John A. McWilliams
Harold Michel†*
Alice and Eddie Miller
Joseph “Herb” Miller†*
Donald and Lorraine Morin*†
Adam Moyer*
Christopher T. Moyer
Jonathan and Susan Moyer

New York State PHCC
Ron and Jeanette Newman
Walter Parkes†*
Roger Peugeot
PHCC of Massachusetts*
Donald Priest†*
Carl Rice
Steve and Ann Rivers
Steve and Isabella Schaefer
Jim and Sandy Stack
Orville and Doreen† Taecker
Dennis Tarpenning†
Kevin and Kathy Tindall
William† and Bette† Trombly*
John† and Jo Wagner
Patrick Wallner
John† and Kate Ward*
Rick and Bonnie Whitaker
Francis† and Anne Williams*
Franklin Youngblood†*
F. Carl Ziegler†
F. Kent Ziegler
R. Scott Ziegler

* Founder
† Deceased



**Plumbing-Heating-Cooling Contractors
National Association**
Educational Foundation
180 S. Washington Street, Suite 100
Falls Church, VA 22046

2020/2021

TEL: (800) 533-7694

FAX: (703) 237-7442

WWW.PHCCFOUNDATION.ORG

