



CROSSING THE THRESHOLD

2023 ANNUAL REPORT



EDUCATIONAL FOUNDATION

PLUMBING-HEATING-COOLING CONTRACTORS NATIONAL ASSOCIATION
EDUCATIONAL FOUNDATION

OUR DOOR OF
OPPORTUNITY

MESSAGE FROM THE CHAIR



December 2023

Dear Foundation Friends, Donors, and PHCC Members,

They say that the only constant is change. 2023 has certainly been a year of change at the PHCC Educational Foundation. This year the Foundation welcomed a new executive director, launched a new five-year Strategic Plan, overhauled our scholarship application process, rebranded the PHCC Academy®, released new HVAC training materials, and will expand our staff to help keep up with growing program demands.

Longtime Foundation staff head Cindy Sheridan made the move to become CEO of the PHCC—National Association in January. We appreciate Cindy's strong leadership at the Foundation and look forward to a closer partnership with the Association with her at the wheel. Our new Foundation Executive Director Daniel Quinonez started in early June, coming with a wealth of experience through his previous roles with a major association management company.

Sadly, we had to say goodbye to some dear friends, with former Foundation staff members Gerry Kennedy and Merry Beth Hall passing away early in 2023. Gerry was the staff head of the Foundation from 1997 to 2010, and Merry Beth was head of apprentice and journeyman training for the Foundation from 2005 to 2018. Both had moved on from PHCC, but their impact still shows in the success of the Foundation today.

The Foundation's new five-year Strategic Plan that our Board approved in May refocuses our work on the next set of priorities for our organization; read more in this report about where the Foundation is heading. I want to thank the board members and staff for investing the time to create this important management tool.

This year, the Foundation's PHCC Academy completed a branding refresh. The new logo, colors, and design of promotional materials were developed to better represent our levels of learning and appeal to a younger audience.

With your generous support, we also made big progress this year on HVACR Training, launching the Pre-Apprentice HVACR Course and the Fast Track to Service & Repair HVACR Course. In about two years, we were able to put together a team that took that training from an idea to an up-and-running program. These courses will go a long way in helping us fill our industry's crucial workforce shortage ... thank you!

Our donors have continued to show their belief in supporting our mission. PHCCCONNECT 2023 attendees in Cleveland donated generously, helping us to end the year with more than \$280,000 raised through the Invest in Your Future Annual Giving Campaign. We also welcomed our newest major donor, Joe Sullivan, to the Foundation Board of Governors.

With all these big changes this year, it truly feels like we're **crossing the threshold** to a new chapter of the Foundation's growth. As I head into my final year as your Foundation chair, I am so proud of the progress that we've made. I've always said that PHCC and the Foundation provide both veteran contractors and young people with opportunities that they would never otherwise have access to ... and our accomplishments this year are a testament to that.

Together, we're not only opening doors of opportunity, but we're equipping people to walk through them. That's the kind of commitment that will forever impact the industry we love.



Kevin Tindall
PHCC Educational Foundation Chair



STEPPING INTO A NEW ERA

This year, the Foundation welcomed a new executive director and launched a new five-year Strategic Plan – taking steps toward ensuring that we continue to *set the standard* for educating and training the industry’s current and future workforce.



Welcome, Dan Quinonez!

The PHCC Educational Foundation’s new executive director, Dan Quinonez, hit the ground running in early June 2023. Quinonez’s career has taken him across the country, representing esteemed organizations within the building industry for more than 20 years, most recently at the Kellen Company, a prominent association management company. With a rich background in association management and public affairs, Quinonez is bringing a wealth of knowledge and experience to lead the Foundation in our efforts to support the p-h-c industry.

Strategic Plan, 2023-2028

To ensure that the Educational Foundation continues to fulfill our mission of providing innovative educational programming to enhance the growth and success of the plumbing and HVACR workforce, our Board of Directors approved the Foundation’s new five-year Strategic Plan in May.

THE FOUR GOALS OF THE PLAN ARE:

Foundation Infrastructure

Goal 1:
The Foundation has the technology and operational infrastructure to support its strategic direction.

Education and Training

Goal 2:
The Foundation increases market share in the HVACR industry and gains industry recognition as a quality HVAC education and training provider.

Education and Training

Goal 3:
The Foundation increases and refines market share in the p-h-c industry and gains industry recognition as a quality education and training provider.

Workforce Development

Goal 4:
The Foundation is recognized as a trusted source for defining an entry point and career path in the p-h-c industry and then delivering training to support a diverse workforce.

The Board also outlined specific objectives in meeting each of these goals. The Strategic Plan is a living document that can be adjusted by the Board of Directors as needed.

THE KEY THAT UNLOCKS THE FUTURE

As the trusted provider of education and training in p-h-c industry, we hold the key to the future, and we're using it to build connections, provide resources, and unlock opportunities for the profession's current and prospective workforce.

Scholarships Update

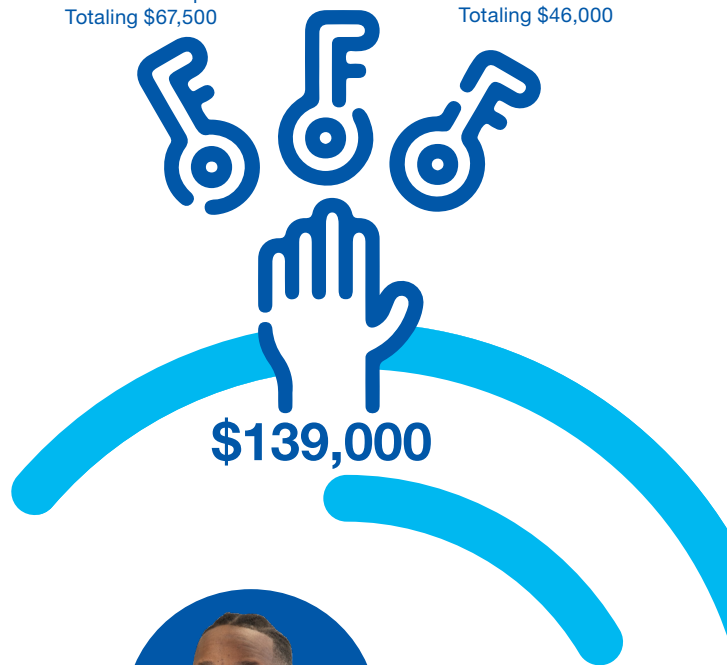
Thanks to you, the PHCC Educational Foundation awarded scholarships totaling **\$139,000 to 57 students** this year. We're also incredibly grateful to our new scholarship sponsors: Sterling, a Kohler brand; and SupplyHouse.com.

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

New Platform

The Foundation launched a new cloud-based scholarship management platform for the 2023 program. The platform allowed Foundation staff to collect applicant data in the same system used by the committee to securely view and score the application materials.

	TRADE SCHOOL STUDENTS:	
	12 Scholarships	
	Totaling \$25,500	
APPRENTICES:		COLLEGE STUDENTS:
31 Scholarships		14 Scholarships
Totaling \$67,500		Totaling \$46,000



"Thank you for all of your generous support! Getting into this trade was a dream I never thought I'd actually accomplish; the confidence, passion, and purpose this job has brought to me has truly changed my life. The support from people like you is what has pushed me to where I am today and will continue for the rest of my career."

— Hannah Keller
St. Petersburg, Florida



"Thank you for your confidence in me. I am married and a father of two beautiful young children. This scholarship is for them, my family, and our future. I am very grateful you elected to grant me the scholarship."

— Cameron White
Trabuco Canyon, California



California Pipeline to Success Program

The Foundation was proud to sponsor PHCC of California’s Pipeline to Success program again this summer, preparing its area youth and young adults for a career in our industry. Congratulations to the California team for organizing and delivering this workforce readiness program and to the 131 students who participated this year! And special thanks to the Ferguson Cares Foundation and the PHCC contractors who contributed to our Invest in Your Future Campaign to provide funding for our sponsorship.



Construction Management Courses

Essentials of Project Management

“Question everything” was the overall message during the Foundation’s popular Essentials of Project Management boot camp this past spring, led by Purdue University Professor Emeritus Kirk Alter and hosted by Viega at its training facility in Broomfield, Colorado. The four-day class – continuing its reputation for being intensive and highly interactive – impacted 23 attendees.



Super Foremen Workshop

The 26 attendees at the Foundation’s Super Foremen Workshop in May got an unexpected lesson on artificial intelligence from instructor Kirk Alter. “Like any tool, if you know how to use it properly, it will save you time and give you an advantage over others who are not using it,” he said. Viega generously sponsored this course at its Seminar Center in Broomfield, Colorado.



“[The instructor] Kirk Alter doesn’t cut corners and doesn’t sugar coat it – he keeps it honest and tells people what they actually need to hear. Because unless you do that, they are not going to know what they need to be successful.”

– Bo Whitson, 2023 Super Foremen Workshop Attendee from Copperra Plumbing and Commercial Services in Taylor, Texas





Photo courtesy of SkillsUSA

SkillsUSA Championships

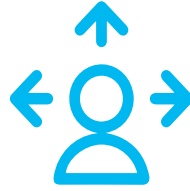
It takes a village to make the SkillsUSA Championships run each year, and the PHCC Educational Foundation is proud to be a part of that village! We're grateful to the members of the Foundation's Plumbing Technical Committee who set up, ran, and judged the SkillsUSA Plumbing Championship and assisted with the HVAC competition this past summer in Atlanta, Georgia ... as well as the sponsors and other industry partners that help give these students an opportunity like this to reach their full potential. Thank you!



National Plumbing and HVAC Apprentices Contests

It was exciting to watch the Foundation's national apprentice contestants – 21 plumbing and 11 HVAC – showcase their skills on the tradeshow floor this year at PHCCCONNECT 2023 in Cleveland, Ohio. Behind the scenes making it all happen was a dedicated team of contractor volunteers as well as several industry sponsors generously providing monetary support and in-kind material and tool donations. Thanks to them – *and you* – we can give these apprentices the opportunity of a lifetime!

OPEN ACCESS



The key to the Foundation’s success is knowing how to pick the lock on what attracts new workers to the trades. With your support, we pushed the door wide open on technical training and management education.

A New Look for the PHCC Academy®!

The PHCC Academy rolled out a new logo and tagline in 2023. Its bold, contemporary look was professionally developed to be more attractive to next-generation candidates, and its blue and green colors reflect the growing importance of the next generation’s environmental mindset. PHCC state chapters are now able to customize the brand for their own apprentice programs and schools. We’re excited to see this fresh logo and look help our member contractors attract new, young talent to the profession!



A Testament to eLearning

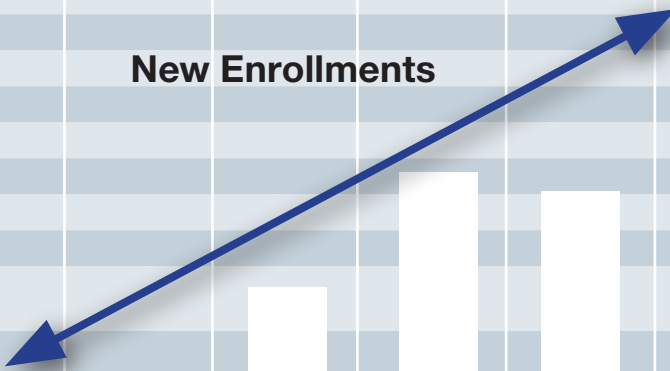
Speaking of the PHCC Academy, our enrollment numbers this year are a big testament to the advantages of eLearning. As you can see below, new enrollments in the Foundation’s online training courses have skyrocketed, reinforcing that this flexible program is accommodating our industry’s changing education needs.

NOT GETTING IT RIGHT CAN RESULT IN COSTLY MISTAKES



Course	FY18	FY19	FY20	FY21	FY22	FY23
Plumbing 101						2,000+
Plumbing 201						
Plumbing 301						
Plumbing 401						
HVAC 101						
HVAC 201						
HVAC 301						
HVAC 401						
Workforce Readiness						
Plumbing Pre Apprentice	500					
Fast Track to Service Plumbing						

New Enrollments





Textbooks

PHCC state and local chapters across the country run apprentice programs that use the Foundation's Department of Labor-approved textbooks and curriculum. PHCC of Indiana's Mechanical Skills trade school in Indianapolis alone has more than 930 students using Foundation textbooks in its classrooms!

From July 2022 to June 2023, an amazing **9,611 PHCC plumbing and HVAC textbooks** were sold, with many going to community colleges and apprentice training programs beyond those available through PHCC. It's because of donors like you that we can leverage up-to-date training materials to attract and train new apprentices in this profession!



Two New HVACR Training Opportunities

Thanks to our generous donors, the PHCC Educational Foundation launched two new entry-level courses this past fall, helping our industry fill the crucial workforce shortage. The **HVACR Pre-Apprentice Course** is an affordable seven-module introductory course designed to train new hires or entry-level techs to diversify their skillset as helpers and prepare them for success in a suitable training program. The **Fast Track to Service & Repair HVACR Course** – 34 online modules designed *by* contractors, *for* contractors – is intended to train technicians to be job- and truck-ready with a well-rounded understanding of HVACR systems.



CROSSING THE THRESHOLD

This year we helped countless people walk through doors of opportunity ... all in an effort to build careers, build businesses, and build our industry's future. How did we do it? With the support of people and partners like you.



**More Giving
Opens the Door to
More Opportunities!**

2023 FUNDRAISING TOTALS:

Goal: \$225,000
Reached: \$280,854

Annual Giving

The 2023 fundraising goal was set at \$225,000. Several PHCC contractors showed their support with powerful gifts, allowing the Foundation to conclude the 2023 campaign year with a total of \$280,854 raised – 402 gifts from 217 donors. The campaign was a resounding success for the growth we saw in the number of gifts, the number of donors, and the total funds donated by PHCC contractors.

Why So Many More Gifts Than Donors?

More donors are finding the benefits of setting their giving to happen automatically every month. Monthly giving spreads contributions over the course of the entire year. This eliminates the need to remember to make a gift, with our donation platform taking care of tapping the donor's credit card or bank every 30 days. Many donors also find monthly giving to be better for their cash flow versus making a single large gift. Donors can simply select "Monthly" when making their gift on the Foundation's donation page to join our monthly donors club.

Custom Donation

Make a gift of any size! Hit the "Monthly" button below to make this gift automatically each month (you can stop any time).

\$

USD

One Time

Monthly

+ Add a Dedication

Show my name as "Anonymous" when displaying this donation to the public.

Donate \$50 Monthly

Major Gifts from Our Corporate Donors

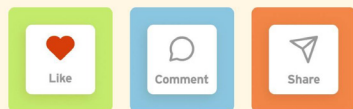
Matching gifts made available from our corporate donors played a major role in our annual giving success. InSinkErator was honored at the Foundation's Donor Reception at PHCCCONNECT 2023 for its 35 years of support for the Foundation's educational mission – including a headline gift for the Invest in Your Future Campaign every year since it began!

SupplyHouse.com celebrates the Tuesday after Thanksgiving with its Trade Tuesday event – making a donation to PHCC and the Foundation for every engagement it receives on a series of special social media posts. The trade community showed up to support the cause, with their social media sharing efforts earning a \$57,000 contribution from SupplyHouse.com.

We are so grateful to these and our other corporate donors ... every dollar creates more pathways!

Like This Post Today, Support the Tradespeople of Tomorrow

We're donating \$2 to PHCC for every like, comment, or share on this post!



The PHCC Educational Foundation is a 501(c)(3) non-profit. More than 100 contractors, manufacturers, and industry partners have made generous gifts 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.

Welcome, Joe Sullivan, Our Newest Member to the Board of Governors!

Joe Sullivan of J.J. Sullivan Plumbing and Heating in Woburn, Massachusetts, has been giving back to the PHCC Educational Foundation since 2001. That's when he started serving on our Scholarship Committee, a role he assumed for the next 22 years. We thank Joe and his wife Jacqueline Piret for their continued commitment to the Foundation and welcome them to the Board of Governors. When asked about why he is joining the Board, Joe simply stated: "I value the organization, and I want to support it, to be a part of something bigger that is helping the industry that has supported my family for all these years."

Endowment and Scholarship Funds

Generous gifts to our Endowment and Scholarship funds make our valuable programs possible. This year, we received:

- \$29,614 in Endowment Fund gifts.
- \$146,068 in Scholarship donations and sponsorships.

Opening Another Door to Giving

Did you know that you can now arrange for a gift to the Foundation in your estate planning? This giving path allows you to plan ahead and make a gift that does not affect your current finances. The Foundation recognizes donors making a planned gift as members of our Legacy Circle. There is no minimum gift size; you do not need to disclose the details of the amount you intend to give; and you may elect to remain anonymous. For more information on a variety of giving options, contact the Foundation staff at (800) 533-7694 or by email at foundation@naphcc.org.





BEYOND THE DOOR

With your support, the Foundation's mission is constantly in motion as we work on new opportunities that we can provide to meet this industry's future needs. Here's a look at what's on the other side of the door in 2024.



New Scholarship for Veterans

When Gil Meyerowitz, the founder of Meyerowitz Supply in New York, passed away in early 2023, he left a sizable allocation of his estate to support veteran initiatives. PHCC—National Association President Joe Cornetta put Foundation staff in contact with the Meyerowitz family to discuss using the estate funding to establish a new scholarship administered by the Foundation. We're grateful to the Meyerowitz family for its \$30,000 contribution to establish the new **Gil Meyerowitz Memorial Scholarship** ... and we're pleased to announce that the scholarship will be available to veterans, reservists, and members of the National Guard beginning in 2024.

New Funding for Hispanic and Latino Scholarships

The mission for Ferguson's Hispanic and Latin American Business Resource Group (HOLA) is to attract, retain, develop, and amplify the efforts of Hispanic or Latin American associates at Ferguson. HOLA members are eager to support organizations that focus on the educational development of individuals within the Latino community, particularly those involved in trade work. After meeting with representatives from HOLA this past year, the Educational Foundation is thrilled to announce that new scholarships to support Hispanic and Latino award winners will be available beginning in 2024, thanks to a gift from the **Ferguson HOLA group and the Ferguson Cares Foundation**.

HVACR 201/301/401 Apprentices Programs

With work on an update to HVACR 101 now complete, revisions and updates to the remaining levels of the PHCC Academy® HVACR apprenticeship program will accelerate in 2024. In addition to making improvements in the learning materials, these revisions will align all four years of HVACR apprentice courses to the new textbook that will be used throughout the program. This will allow students to make a single textbook purchase that covers all four levels of the apprenticeship. We couldn't make this kind of progress without your support ... thank you!

BALANCE SHEET FOR 2023

December 31, 2023 (Unaudited, Preliminary Numbers)

	2022	2023	Variance
ASSETS			
Current Assets			
Cash & cash equivalents	\$651,856	\$689,552	\$37,696
Accounts Receivable	\$24,000	\$11,998	\$(12,002)
Pledges Receivable	\$64,053	\$55,713	\$(8,340)
Investments at Market Value	\$14,769,211	\$16,840,525	\$2,071,314
Prepaid Items	\$91,627	\$470,964	\$379,337
TOTAL CURRENT ASSETS	\$15,600,747	\$18,068,752	\$2,468,005
Long-Term Assets			
Property & Equipment, Net	-	\$4,280	\$4,280
TOTAL ASSETS	\$15,600,747	\$18,070,033	\$2,472,286
LIABILITIES AND NET ASSETS			
Liabilities			
Accounts Payable	\$15,287	\$63,640	\$48,353
Accrued Liabilities	\$118,962	\$48,722	\$(70,240)
Deferred Revenue		\$53,070	\$53,070
Other Short-term Liabilities		\$83,034	\$83,034
TOTAL CURRENT LIABILITIES	\$134,249	\$248,466	\$114,217
Net Assets - Prior Year			
Operating, Program Fund and Scholarship Fund	\$8,856,191	\$8,990,306	\$134,115
Endowment - Perm. Restricted	\$5,455,629	\$5,455,629	\$- 0
Endowment - Donor Temp Restricted	\$981,500	\$1,017,671	\$36,171
TOTAL PRIOR YEAR NET ASSETS	\$15,293,320	\$15,463,606	\$170,286
Change in Net Assets	\$173,178	\$2,360,961	\$2,187,783
TOTAL NET ASSETS	\$15,466,498	\$17,824,567	\$2,358,069
TOTAL LIABILITIES AND NET ASSETS	\$15,600,747	\$18,073,033	\$2,472,286

BOARD OF DIRECTORS

Officers

Foundation Chair

Kevin Tindall

Tindall & Ranson Plbg & Htg
Windsor, NJ

Foundation Vice-Chair

Patrick Wallner

Wallner Plumbing Company, Inc
Redding, CA

Foundation Secretary-Treasurer

Steve Rivers

Rivers Plumbing, Heating & Air
Pleasanton, CA

Foundation Executive Director

Daniel Quinonez

PHCC Educational Foundation
Falls Church, VA

Directors

Keith Bienvenu

Bienvenu Brothers Plumbing
Harahan, LA

Jan Bray

Professional Educator Representative
Bray Strategies
Ft. Meyers, FL

Dan Callies

Oak Creek Plumbing, Inc.
Oak Creek, WI

Joseph Cornetta

Cornetta Brothers, Inc.
Elmont, NY

Ray Jones

Raven Mechanical
Houston, TX

Joleen Lorg

AEC Representative
PHCC of Kansas
Wichita, KS

Jonathan Moyer

Cocalico Plumbing & Heating
Denver, PA

Don Powers

Plumbing Help Now
West Seneca, NY

Jason Pritchard

PriCor Technologies
Seatac, WA

Ann Rivers

PHCC Auxiliary Representative
Rivers Plumbing, Heating & Air
Pleasanton, CA

Randy Roberts

Manufacturer Representative
Rheem Manufacturing Company
Smith, AR

Cindy Sheridan

PHCC National Association
Falls Church, VA

Nicole Urizzo

Apprenticeship Advisory Council Representative
PHCC of New Jersey
Red Bank, NJ

BOARD OF GOVERNORS

The Board of Governors is composed of contractors, manufacturers, and other industry partners who are major contributors to the Educational Foundation. Members of the Board of Governors are actively involved in shaping the future of the plumbing and HVACR industries through education.

Charter Founders

American Standard
Delta Faucet and the Masco Family of Companies (Alsons Corp., Aqua Glass Corp., Brass Craft Mfg.)
InSinkErator
Kohler Company

Program Underwriter

Eljer Plumbingware, Inc.

Chancellor

Moen Incorporated
Trimble

Corporate Founders

Anaheim Manufacturing
Anvil International, Inc.
Bradford White Corporation
Cerro Flow Products LLC
Charlotte Pipe and Foundry
Elkay Manufacturing Co.
Federated Mutual Insurance
Ferguson and Wolseley, plc
Legend Valve
Milwaukee Tools
NIBCO INC.
Rheem Mfg. Co. and Ruud Water Heater
Viega LLC
Watts Water Technologies, Inc.

Contractor Members

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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)
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Charles "Red" Englert†*
Richard E. Farrell*
David† and Jean† Fox*
John Garvelink
Mary Garvelink
Mark Giebelhaus
John Giolitto†*
James Hansbauer*
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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



EDUCATIONAL FOUNDATION

**Plumbing-Heating-Cooling Contractors
National Association**

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