

BLUEPRINT FOR IMPACT

2024 ANNUAL REPORT

PLUMBING-HEATING-COOLING CONTRACTORS NATIONAL ASSOCIATION
EDUCATIONAL FOUNDATION



EDUCATIONAL FOUNDATION

MESSAGE FROM THE CHAIR



PATRICK WALLNER

PHCC EDUCATIONAL FOUNDATION CHAIR

Dear Foundation Friends, Donors, and PHCC Members,

Building something that stands the test of time requires more than just effort; it requires a clear blueprint and a shared vision. Everyone must be working in the same direction and toward the same goals to create a product that exceeds expectations. At the PHCC Educational Foundation, our product is a constantly evolving line of educational programs built to fulfill our mission to enhance the growth and success of the plumbing and HVACR workforce. In 2024, the Foundation focused on the goals of our strategic plan, laying the groundwork for the next phase of impactful accomplishments.

The PHCC Academy® established plans to expand its line of online classes and folded the PHCC—National Association's online training offerings into its structure as well. Having the online training under a single department aligns PHCC Foundation and Association education goals and simplifies the experience for contractors and their employees seeking PHCC training.

Our industry needs a solid base of new workers entering the trades to ensure that positions can be filled. What better way to help ease the path into a trades career than through offering scholarships for apprentices and students pursuing studies related to our field? The Foundation's scholarship program expanded into new areas, offering funding for Hispanic and Latino applicants and a new award reserved for military veterans.

A communications goal this year was to make the connection between our donors' gifts and the impact they make on real people's lives. Our donors got the message and have continued to show their belief in supporting our mission. PHCC CONNECT 2024 attendees in Birmingham donated generously, helping us to end the year with more than \$285,000 raised through the Invest in Your Future Annual Giving Campaign.

Finally, I want to thank Kevin Tindall for his service as Foundation Chairman from 2020 to 2024. His leadership was key to bringing the Foundation through the challenges caused by the pandemic. His term saw a commitment to developing HVAC training and building out the infrastructure to deliver our online education to a wider audience. His commitment to the Foundation's success was clear, and we appreciate his service to the industry.

As our blueprint to greater impact guides our work in 2025, we look forward to collaborating with our dedicated volunteers and generous donors to achieve extraordinary results and create lasting, transformative programs.



PATRICK WALLNER

PHCC EDUCATIONAL FOUNDATION CHAIR



Planning for Growth Under New Leadership

This year, the Foundation welcomed a new chairman and laid out a blueprint for collaboration, breaking down silos to ensure that – together – PHCC and the Educational Foundation continue to set the standard for educating and training the industry’s future workforce.



PATRICK WALLNER – THE EDUCATIONAL FOUNDATION’S NEW CHAIR

Since 1991, Patrick Wallner has grown his family company – Wallner Plumbing, Heating & Air Conditioning – into a thriving operation. Now, he’s bringing that same dedication to building up the entire plumbing-heating-cooling industry as the new chairman of the PHCC Educational Foundation.

A familiar face at PHCC and the Foundation, Wallner has been a PHCC member for more than 30 years and has served as a volunteer leader at the local, state, and national levels. He was president of PHCC of California from 1997 to 1998, served as Zone 4 Director for the National Association, and went on to become National President from 2016 to 2017.

Throughout his career, Wallner has credited his success to the value of education and lifelong learning. This belief drives his commitment to expanding the Foundation’s educational initiatives, which support individuals at different stages of their careers.

As chairman of the Foundation, Wallner’s mission is clear: to continue building a strong, skilled, and professional workforce that will carry the p-h-c industry into the future.



NEW ROLE FOR EDUCATIONAL FOUNDATION EXECUTIVE DIRECTOR DAN QUINONEZ

In November, PHCC announced the promotion of Dan Quinonez to PHCC Chief Operating Officer. This is an expanded role for Quinonez, as he continues his position as PHCC Educational Foundation Executive Director.

In closely collaborating with PHCC CEO Cindy Sheridan, the PHCC team, and PHCC members, Quinonez is excited to grow membership, strengthen partnerships, and boost industry exposure for both PHCC and the Foundation. “Together,” he says, “we will enhance operational performance

and remain dedicated to delivering exceptional value to contractors, all while upholding the highest standards of quality and service in everything we do.”

WORKFORCE DEVELOPMENT



A Blueprint for Building a Skilled Workforce

We understand what is needed to shape the workforce of tomorrow, and we're using that knowledge to construct connections, lay the groundwork for resources, and create opportunities for current and future plumbing and HVAC professionals.



Scholarship Program Update

The PHCC Educational Foundation awarded \$129,000 in scholarships to 55 students in 2024:

39 Apprentices Awarded

\$96,000

4 Trade School Students Awarded

\$7,500

12 College Students Awarded

\$25,500

IMPROVED FORM

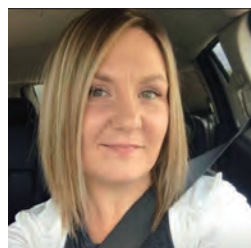
In 2024, the Foundation created an entirely new version of the application form to better guide applicants. A new video was created to explain the requested information, with clips from that video added to relevant sections of the form for clarity. This reduced confusion and helped applicants understand the selection committee's expectations.



"Thank you, PHCC Foundation, for believing in me and being a stepping stone to helping me achieve my dreams. I promise to make the most of this opportunity."

— **Illia Moore II**, Nolensville, Tennessee

**SCAN THIS QR CODE
TO HEAR FROM
OUR GRATEFUL
RECIPIENTS!**



"I'm so grateful to be a part of something that has real life-changing impact, because this has changed my life completely, and I'm so thankful for that."

— **Jennifer Will**, Plainfield, Indiana

NEW SCHOLARSHIP AWARDS



Honoring Our Veterans: The Gil Meyerowitz Memorial Scholarship

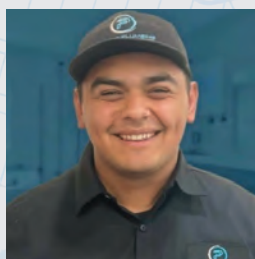
The Foundation was honored to announce the first winner of the Gil Meyerowitz Memorial Scholarship – Derek Hawk of Riverside, California.

“I joined the Marine Corps at the age of 20. I was inspired to follow in my grandfather’s footsteps, though he was in the Navy,” says Hawk. After boot camp, Hawk trained to become a tank mechanic. He was promoted to Corporal, but unfortunately suffered an injury and was released with an honorable discharge. “I am grateful for the time I got to serve my county, although I wish it was more.”

This annual award is funded by generous contributions made by the estate of Gil Meyerowitz, founder of Meyerowitz Supply in New York, and his family. The award is restricted to providing educational opportunities for veterans, reservists, and National Guard members. We extend our deepest gratitude to the Meyerowitz family for their commitment to supporting those who have served our country.

Expanding Opportunities: New Scholarships for Hispanic and Latino Students

Thanks to a generous gift from the Ferguson Cares Foundation through the Ferguson Hispanic and Latin American Business Resource Group (HOLA), the PHCC Educational Foundation offered new scholarships for Hispanic and Latino students in 2024.

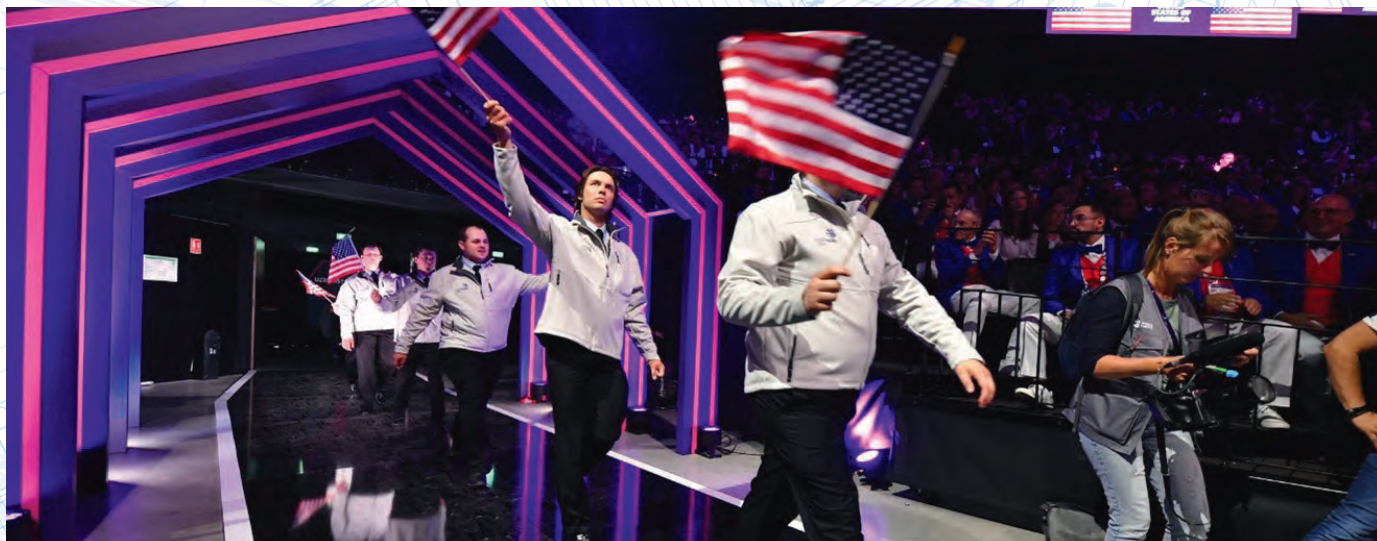


“I wouldn’t have been able to continue my education without this scholarship. I appreciate your generosity and hope you all know you’re making a difference in this industry. Thank you.”

— **Andres Martinez**
Santa Ana, California

More Than Just a Competition ... Contests Shape Careers and Have a Lasting Impact

For aspiring p-h-c professionals, contests provide a platform to showcase their talents on a national (or international!) stage, cultivate valuable connections, and impress their friends and families back home. Beyond personal growth for the competitors, though, these contests are essential in shaping the industry’s reputation, elevating its visibility, and fostering a deeper respect for the plumbing and HVAC fields. The Foundation is proud to contribute to this important framework.





SKILLSUSA CHAMPIONSHIPS

The PHCC Educational Foundation again supported the SkillsUSA Championships, held June 26-27, 2024, in Atlanta, Georgia. Each year, members of the Foundation's Technical Committee set up, run, and judge the SkillsUSA Plumbing Championship and assist with the HVAC competition. It takes the generosity of a host of volunteers, sponsors, and other industry partners to give these students an opportunity like this to reach their full potential.

WORLDSKILLS COMPETITION

The Foundation proudly supported Brady Kroll of Barnesville, Minnesota, who represented the United States at WorldSkills Lyon 2024 in France in September. Competing among 25 other global contestants, Kroll earned his spot after winning a Silver medal in the 2022 SkillsUSA Plumbing Championship. To prepare for the international competition, Kroll received extensive training and coaching from the United Association, Robert Hahn, and many others. Special thanks to the United Association, IAPMO, Milwaukee Tool, and Bradford White for their support. Although Kroll didn't win a medal at WorldSkills, the experience will contribute to his future success and help enhance training for our 2026 competitor.

NATIONAL PLUMBING AND HVAC CONTESTS AT CONNECT

A total of 24 apprentices – 18 plumbing and 6 HVAC – showcased their skills at the Foundation's National Plumbing and HVAC Apprentice Contests, held on the tradeshow floor during CONNECT 2024 in October. New this year – and with a fresh approach to recognizing the next generation – CONNECT attendees cheered on our competitors during an exciting opening night pep rally at the event in Birmingham, Alabama.

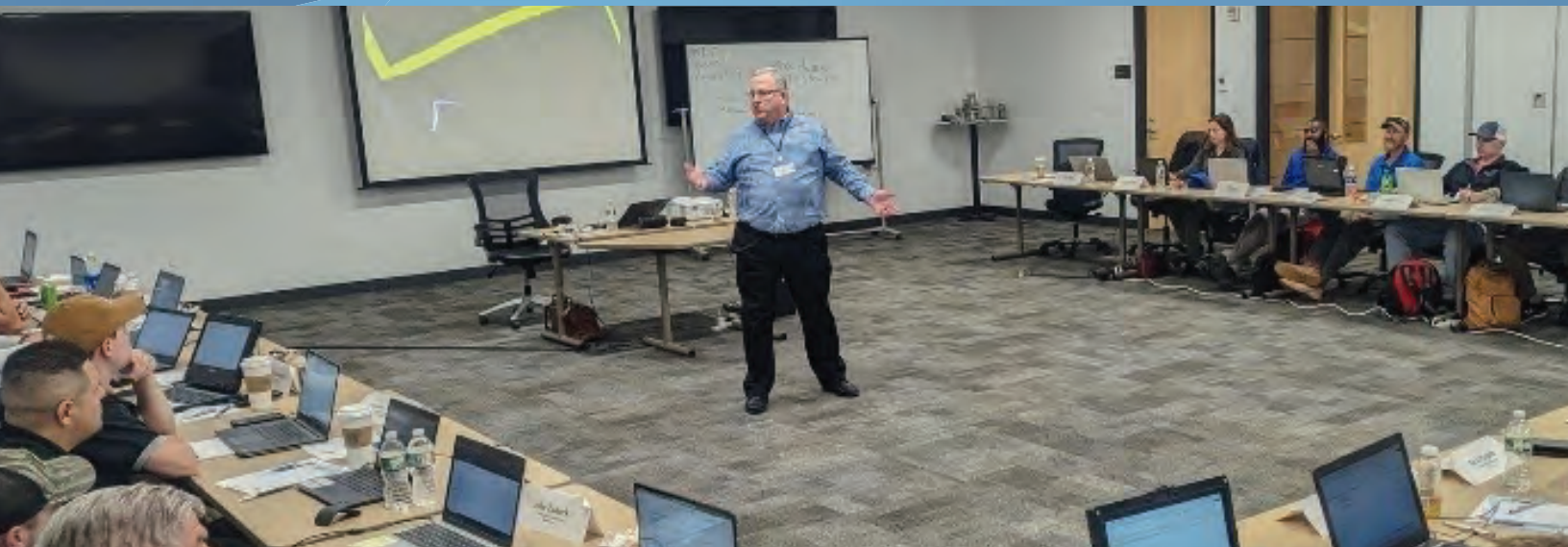


EDUCATION AND TRAINING



A Master Plan

Our industry's success relies on the Foundation's comprehensive textbooks, technical training, and proven management education to guide professionals through an ever-evolving landscape. What makes this possible? Visionaries like you who are integral to our master plan for progress!



Live And In Person: The Essential Role of Live Classes in Mastering Skills and Boosting Efficiency

Centered around a theme of building confidence and skills to handle the real-world situations that construction professionals experience, both the 2024 **Essentials of Project Management** class (March 13-16, 2024) and the **Super Foremen** workshop (May 3-4, 2024) were led by popular Foundation instructor Kirk Alter.

"Use the tools you have," was a key takeaway from the Essentials class, with Alter guiding attendees on how to best

leverage software to document, analyze, and report job information.

During the highly interactive and intense Super Foremen workshop, 27 foremen learned how AI and other technologies can help with time management as well as how to become effective front-line managers with the goal of "solving other people's problems."

Both these sessions were generously hosted by Viega at its Training Facility in Nashua, New Hampshire.

LIFE-CHANGING IMPACT FOR ONE ESSENTIALS CLASS ATTENDEE

Working on the administrative side of the family business, Amanda Bowerman looked to the Foundation's Essentials of Project Management class to gain perspective on what happens on the field side of the business so that she could improve her professional skills and develop within the company. As you'll read below, she gained that and so much more:

"Despite being familiar with the business, I had a lot of reservations about attending this training. I assumed that I would not be taken seriously and that I would be looked down on for my lack of experience in the field. ... In reality, it felt like I spent the week with a rowdy band of brothers. I had assumed that my background would be disregarded since it was so different; however, it actually was viewed as an asset. There was so much information presented in this class – all of it invaluable.

The most important thing I learned, however, was actually about myself. I came to this class feeling uncertain about my place in the business. I left knowing that I did have a place and that I brought significant value. I feel equipped, energized, and excited for all that I finally realize that I can do. For any woman who has reservations about attending, please know that there is space for you in this class. You can be the exception and exceptional at the same time. Thanks again for all that you did to make this training happen."

— Amanda Bowerman
Hospitality Services LLC
Johns Island, South Carolina



HIGH PRAISE FROM A SUPER FOREMEN WORKSHOP ATTENDEE

"It's definitely not your typical class. It's a lot more interactive, a lot more involved. I guess because [instructor Kirk Alter] has been there, he's done it, he knows how it goes, and he can get on your level. ... I don't think you can get better information anywhere, really."

— Billy Jones
COPPERA
Taylor, Texas





10,035+

Total Enrollments



86,742+

Hours of Learning



42

States and Countries Served

PHCC ACADEMY® – a Pipeline Approach to Training

The PHCC Academy® offers a clear pathway for plumbing and HVAC professionals at every stage of their career. With programs designed for apprentices (and even pre-apprentices!), technicians, and business owners, our content is tailored to support growth at each level.

And, we're proud to announce that 2024 saw us pass the impressive milestone of 10,000 enrollments in our training!

PHCC ACADEMY® NOW COVERS BOTH FOUNDATION AND ASSOCIATION ONLINE EDUCATION

In 2024, the PHCC National Association's education department was folded into the PHCC Academy®, providing contractors with a more streamlined way to reach online educational offerings from PHCC. All online technician and apprentice training will be delivered through the Academy, with a future library of online educational offerings for managers and business owners to be developed.

PHCC ACADEMY® COURSES AVAILABLE

Workforce Readiness

Pre-Apprentice Plumbing

Pre-Apprentice HVACR

Fast Track to Service & Repair Plumbing

Fast Track to Service & Repair HVAC

Plumbing 101

Plumbing 201

Plumbing 301

Plumbing 401

HVAC 101

HVAC 201

HVAC 301

HVAC 401

Finance Management

NEW FINANCE MANAGEMENT COURSE

Updated and re-released through the Academy, the PHCC Finance Management course provides business owners and managers with a solid understanding of the basic finances of running a contracting business.



TEXTBOOKS

PHCC state and local chapters nationwide offer apprentice programs that use the Foundation's Department of Labor-approved textbooks and curriculum. From July 2023 to June 2024, a remarkable **10,377 PHCC plumbing and HVAC textbooks** were sold, many of which were distributed to community colleges and apprentice training programs beyond those provided through PHCC. Thanks to generous donors like you, we're able to provide current, high-quality training materials that help attract and prepare the next generation of skilled apprentices in the industry!

FUNDRAISING AND DEVELOPMENT



How do we transform a vision around the conference room table into action that shapes real careers, thriving businesses, and a brighter future for our industry? With the generous support of people and partners like you!

With Your Generous Donations, We Are Making a Huge IMPACT!

ANNUAL GIVING

The 2024 fundraising goal was \$240,000. Thanks to extraordinarily generous giving and a few special gifts, we ended the campaign year with a total of \$285,000 raised from 194 donors. Matching gifts made available from corporate donors such as InSinkErator, SupplyHouse.com, NIBCO, and Ferguson played a major role in our annual giving success.

Monthly donors are also discovering the convenience and impact of setting up automatic monthly giving. By spreading your contributions over the course of the entire year, monthly giving removes the hassle of remembering to make a gift. Simply select the "Monthly" box on our donation page to join our monthly donors club.

2024 Fundraising Goal:
\$240,000

2024 Total Reached
\$285,000



ENDOWMENT AND SCHOLARSHIP FUNDS

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



\$29,381
in Endowment and
Program Fund Gifts

\$112,000
in Scholarship Donations
and Sponsorships

LEGACY CIRCLE

Not every gift has to come today. There is a growing group of PHCC contractors who have quietly taken the step of adding the Foundation to their estate plans. Legacy gifts provide a way of showing your support for industry education without an impact on your current funds and can be structured in ways that may provide tax benefits. Please consider this giving avenue, and contact us to learn more about this option.



Industry Exposure

Expanded Reach and Engagement



Designing the Future

Our Blueprint for Greater Impact in 2025



TRADE TALKS PODCAST

Leading up to PHCC CONNECT 2024, Foundation Executive Director Dan Quinonez traveled to Texas for a conversation with industry influencer Roger Wakefield on *The Trade Talks* podcast. The two covered the exciting events happening at CONNECT, our apprentice contests, the invaluable role of mentorship in the industry, workforce development, and much more. It was an episode packed with passion and industry insight!

PHCC ACADEMY® SOCIALS

The PHCC Academy® debuted its own set of social media accounts in 2024, allowing customized messages about educational offerings to reach new audiences. Search for “PHCC Academy” on your favorite platform, and subscribe to get updates on the training available.



With your support, the Foundation’s online training course catalog will expand next year with new offerings developed to meet the training needs of managers and business owners. Look for these programs to launch in 2025:

PHCC PATHWAY TO MANAGEMENT

A 10-week digital-first program for both the current and future managers of plumbing and HVACR businesses to master the skills of organizational leadership, people management, and business finance.

PHCC ON DEMAND

A new way to engage training videos from PHCC and our manufacturer partners. Accessible online through a specially designed app, a growing library of content will allow contractors to quickly find educational videos to fit their training needs. Manufacturer-specific training videos will help your employees access the knowledge they need to do their jobs right.

INDUSTRY SKILLS DEVELOPMENT COURSES

With the PHCC Academy® expanding to cover Association training offerings, we can now work to incorporate a wealth of educational content available from PHCC’s Quality Service Contractors (QSC). Look for a variety of new courses developed by the QSC coaches and partners to be rolling out in 2025.

We are also working with ESCO Institute to offer an EPA Section 608 Certification course, as well as a Low GWP Refrigerant Safety course, on the PHCC Academy® eLearning platform. We’re excited to add these certification courses to our HVACR training lineup as another resource for contractors.

BALANCE SHEET FOR 2024

December 31, 2024 (Unaudited, Preliminary Numbers)

	December 31, 2023	December 31, 2024	Year-Over-Year
ASSETS			
<u>CURRENT ASSETS</u>			
Cash & cash equivalents	\$690,842	\$205,789	\$(485,053)
Accounts Receivable	\$41,567	\$85,560	\$43,993
Investments at Market Value	\$16,840,525	\$18,925,449	\$2,084,924
Pledges Receivable	\$72,600	\$54,450	\$(18,150)
Prepaid Expenses	\$398,051	\$913,688	\$515,637
Intercompany Receivable	\$26,041	\$59,550	\$33,509
TOTAL CURRENT ASSETS	\$18,069,626	\$20,244,486	\$2,174,860
<u>LONG-TERM ASSETS</u>			
Property & Equipment, Net	\$4,280	\$4,281	\$1
TOTAL ASSETS	\$18,073,906	\$20,248,767	\$2,174,861
LIABILITIES AND NET ASSETS			
<u>LIABILITIES</u>			
Accounts Payable	\$60,277	\$65,013	\$4,736
Accrued Liabilities	\$49,799	\$49,950	\$151
Deferred Revenue	\$53,070	\$44,133	\$(8,937)
Other Short-term Liabilities	\$1,975	\$92,018	\$90,043
TOTAL LIABILITIES	\$165,121	\$251,114	\$85,993
<u>NET ASSETS</u>			
Operating, Program Fund and Scholarship Fund	\$8,835,012	\$11,240,694	\$2,405,682
Endowment - Perm. Restricted	\$5,505,331	\$5,505,331	\$-
Endowment - Donor Temp Restricted	\$1,162,761	\$1,162,761	\$-
Total Net Assets	\$15,503,104	\$17,908,786	\$2,405,682
Change In Net Assets	\$2,405,681	\$2,088,867	\$(316,814)
TOTAL NET ASSETS	\$17,908,785	\$19,997,653	\$2,088,868
TOTAL LIABILITIES AND NET ASSETS	\$18,073,906	\$20,248,767	\$2,174,861

BOARD OF DIRECTORS

OFFICERS



Foundation Chair

Patrick Wallner

Wallner Plumbing Company, Inc
Redding, CA



Foundation Vice-Chair

Steve Rivers

Rivers Plumbing, Heating & Air
Pleasanton, CA



Foundation Secretary-Treasurer

Jonathan Moyer

Cocalico Plumbing & Heating
Denver, PA

DIRECTORS

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Arndt & Son Plumbing
Oregon, WI

Hunter Botto

PHCC Auxiliary Representative
Saint Petersburg, FL

Dan Callies

Oak Creek Plumbing, Inc.
Oak Creek, WI

Crystal Carter

Apprenticeship Advisory Council
Representative
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Brandon Hudson

Professional Educator Representative
SkillsUSA
Leesburg, VA

Ray Jones

Raven Mechanical
Houston, TX

Brent McDiarmid

Glenn Mechanical Co.
El Dorado, AR

Jason Pritchard

PriCor Technologies
Seatac, WA

Randy Roberts

Manufacturer Representative
Rheem Manufacturing Company
Fort Smith, AR

Cindy Sheridan

PHCC—National Association
Falls Church, VA

Larry Shoemaker

Bethlehem, PA

Ken Smith

United Air Temp
Newington, VA

Nicole Urizzo

AEC Representative
PHCC of New Jersey
Red Bank, NJ

Daniel Quinonez

PHCC Educational Foundation
Falls Church, VA

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

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Elkay Manufacturing Co.
Federated Mutual Insurance
Ferguson and Wolseley, plc
Legend Valve
Milwaukee Tool
NIBCO INC.
Rheem Mfg. Co. and Ruud Water Heater
Viega LLC
Watts Water Technologies, Inc.

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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)
James T. Driscoll, Jr.
David and Janet Dugger
Charles "Red" Englert†*
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David† and Jean† Fox*
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Mary Garvelink
Mark Giebelhaus
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William Lynch†*

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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



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

Educational Foundation
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Falls Church, VA 22046



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