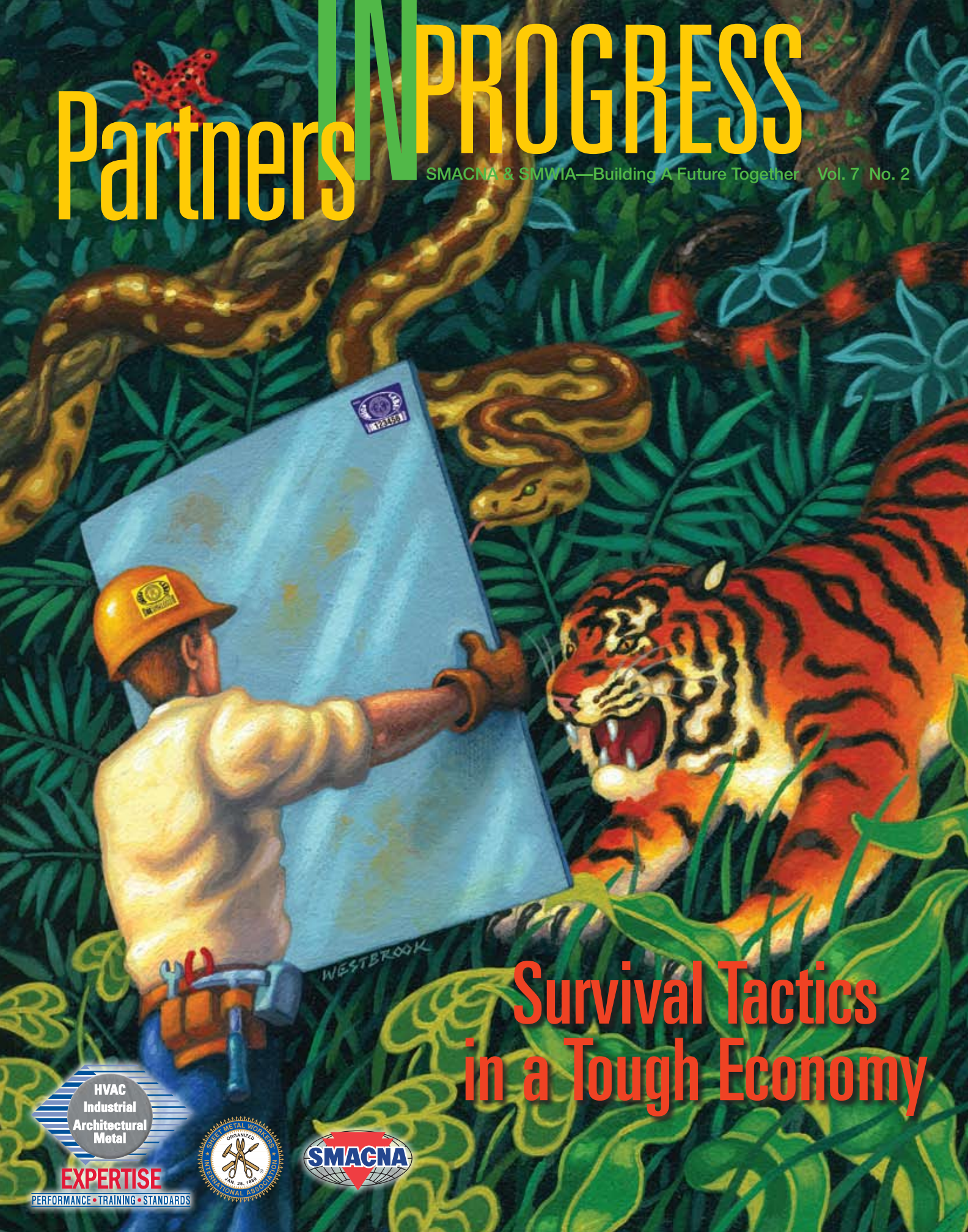


Partners IN PROGRESS

SMACNA & SMWIA—Building A Future Together Vol. 7 No. 2



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Code of Excellence FAQs

With the roll-out of the SMWIA's Code of Excellence (COE), many contractors and craftworkers have questions about its implementation. Here are answers to some of the most frequently asked questions.

Q: How does the implementation of the Code improve market share?

A: The COE, taken broadly, should help to improve market share by providing a marketing device that signatory contractors can use to talk about what they bring to the table in terms of skills and work practices and zero tolerance for substance abuse. Further, the Code could weed out unproductive workers and increase overall productivity.

Q: What other trades have a similar code and how has it worked?

A: The International Brotherhood of Electrical Workers (IBEW) has adopted a similar code, and it has had fairly wide reception. There has been some resistance on the part of the International Union of Painters and Allied Trades (IUPAT) to adopt a similar Code of Excellence as a result of discomfort with the three strikes provisions.

Q: Does zero tolerance for substance abuse mean absolute zero in the blood stream or some other level?

A: The Code does not address drug testing specifically and what levels should be set for testing purposes. Presumably, if the collective bargaining parties have provided for drug testing, any positive test would qualify as a violation of the Code.

Keep in mind that companies that perform drug tests do not normally report findings of drug levels that fall below the levels set in the program. For those areas that do not provide for drug testing, determining whether the termination for cause is appropriate will likely focus on reasonableness of the employer's suspicion that the employee was impaired or intoxicated.

Q: Can a local agreement be amended and a "generic" provision be adopted stating that the COE has been adopted and state "where the agreement conflicts with the Code of Excellence, then the Code of Excellence shall govern"?

A: Yes, it is possible to go that route, but any agreement adopting that language could be modified by future versions of the Code.

Q: If the Code is adopted by the local and referenced in the collective bargaining agreement (CBA), are ALL employers REQUIRED to use the Code, or could they continue business as usual?

A: If the Code is referenced in the CBA and is agreed to by the association on behalf of those contractors who have given it their bargaining authorization, whatever is adopted is obligatory.

For additional information on the Code of Excellence, refer to Partnership Communicator Vol. 4, Issue 1, available on the Partners in Progress Web site at pinp.org/newsletters.

Out of the Briar Patch

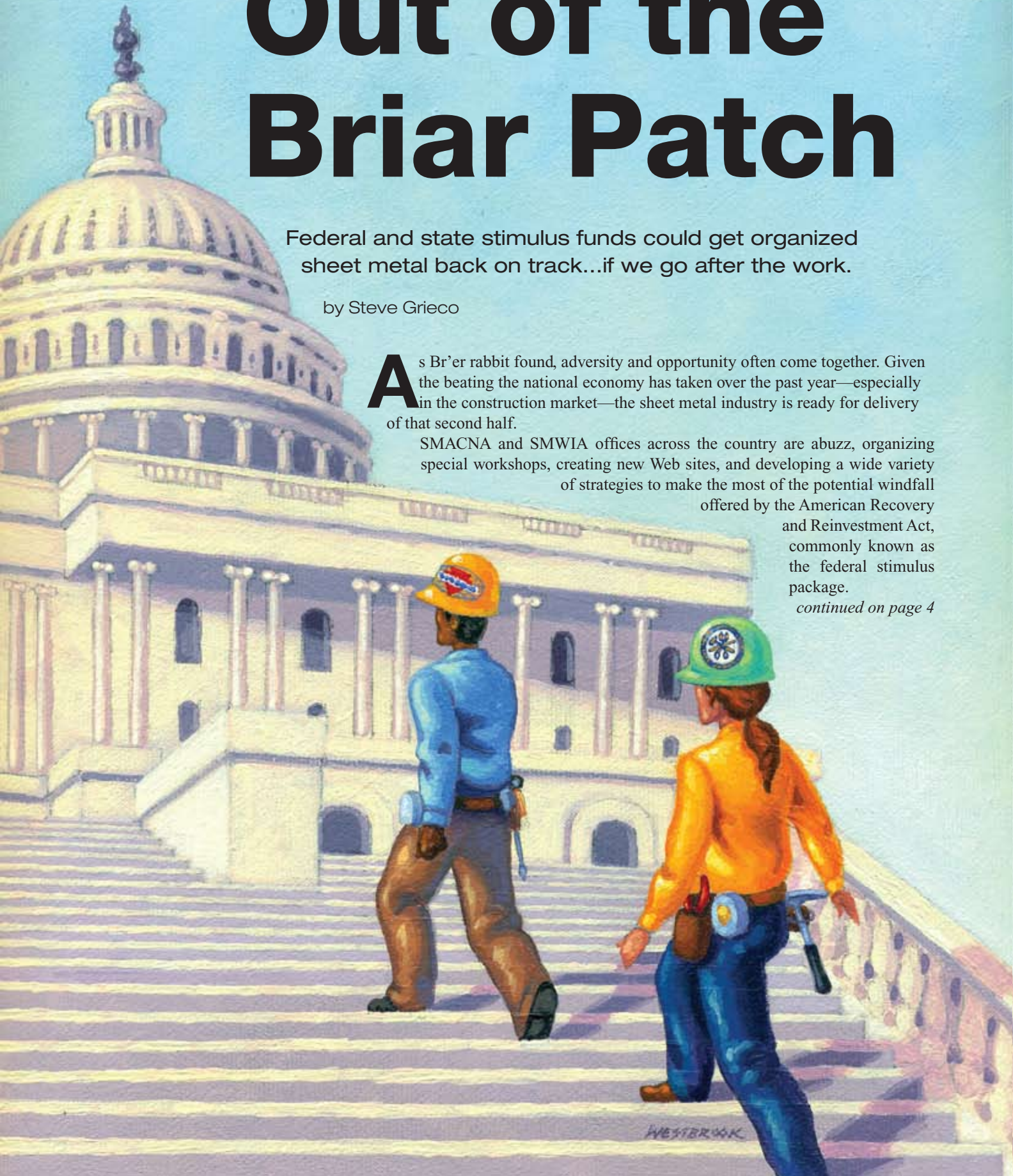
Federal and state stimulus funds could get organized sheet metal back on track...if we go after the work.

by Steve Grieco

As Br'er rabbit found, adversity and opportunity often come together. Given the beating the national economy has taken over the past year—especially in the construction market—the sheet metal industry is ready for delivery of that second half.

SMACNA and SMWIA offices across the country are abuzz, organizing special workshops, creating new Web sites, and developing a wide variety of strategies to make the most of the potential windfall offered by the American Recovery and Reinvestment Act, commonly known as the federal stimulus package.

continued on page 4



continued from page 3

Preparation is important because the competition for this work—energy conservation retrofits and repair projects—is fierce. Though, according to Stan Kolbe, SMACNA national director of legislative affairs, union contractors should be able to choose from a long list of major stimulus projects in most major metropolitan areas.

“A lot of our folks have been doing this important energy efficiency work forever and are the very best at it,” he says.

Kolbe thinks that a high percentage of the green building retrofit project money going out the door will be directed to the sheet metal/HVAC industry, putting union contractors at the forefront of the emerging energy efficiency economy.

“We’re well on our way toward making this an energy efficient nation,” Kolbe continues. “I have heard a number of firms say that when most of these projects are bid and under-way, it’s going to be a great time for sheet metal contractors. Especially those with the workforce familiar with this more sophisticated energy efficiency work.”

Get ready

Infrastructure work on roads and bridges has already begun. Further, numerous Federal agencies have already appropriated funds to start building modernization projects. The General Services Administration (GSA) alone has hundreds of large projects, in all 50 states, to transform Federal facilities—from National Park buildings to Veterans Administration hospitals and post offices—into high-performing green buildings.

For the most part, focus of these projects will be on upgrading old buildings owned by the Federal government. The types of structures found most often on project lists are big energy hogs like prisons and schools that have been in need of energy retrofits for years. With the stimulus funding effort, they will finally get the attention they deserve.


Although Federal buildings will be the focus of many of the stimulus dollars, states are distributing money to increase energy efficiency and improve weatherization. The difficulty with state money is that each uses and distributes funds differently. Some have already earmarked specific funds for specific projects, ranging from public housing to school modernization.

Jim Hussey, president and CEO of Marina Mechanical in San Leandro, Calif., has found that California—among other states—is managing stimulus funds by channeling them through state agencies that are accountable for the money spent. “Local unions and SMACNA chapters need to get involved at the state level,” he says, “because it is the best way to identify and capture the maximum amount of stimulus dollars.”

In Michigan, for example, hundreds of millions of dollars are allocated to funding residential energy efficiency projects—covering everything from new furnaces and hot water heaters to air conditioners and duct cleaning.

To prepare for these and other opportunities, SMACNA’s Michigan chapter held a special stimulus workshop that attracted 50 contractor and union representatives. The event,

Tips for Finding Opportunity Amidst Adversity

- 
- Be proactive and assertive;
 - Use a variety of information sources, including state recovery offices;
 - Establish or strengthen connections with politicians and government officials, which means regularly attending meetings and hearings and getting to know the decision makers;
 - Keep up with the resources SMACNA and SMWIA offer their members to assist with capturing Federal and state stimulus funds;
 - Partner with design firms and energy efficiency engineers for an integrated team approach;
 - Highlight your company’s green credentials, but don’t simply “green wash” your business by painting an environmental image on marketing materials;
 - Know the basic principles of sustainable building and energy efficiency standards;
 - Be patient when it comes to waiting for distribution of funds and project details;
 - Get smart on energy efficiency tax credits that will attract private customers;
 - Be involved in Leadership in Energy and Environmental Standards (LEED) certification and processes; and
 - Look into funding for training programs being used to prepare workers for the new energy efficiency economy.

titled Federal Stimulus Money—How To Get Your Share, featured guest speakers including the director of the Michigan Economic Recovery Office and union business managers from across the state.

Attendees learned the basics of contracting with the federal government and also got some tips on tracking project opportunities through new Web sites such as SMACNA’s Recovery Track and the Federal Business Opportunities system (fbo.gov).

“Many contractors have assigned someone to go online everyday to review Web sites and get information on jobs,” says Richard Northrup, Michigan’s SMACNA chapter executive vice president. “Our contractors have a significant opportunity to fill up the pipeline with work that could carry them through this year and into the next.”

In Philadelphia, the Local 19 office is counting on networking and local marketing efforts to land stimulus funded projects. Labor and management representatives are working together to develop Internet sites that feature their skills and accomplishments.

They are also creating presentation materials that will be used during meetings with potential customers. This joint SMACNA and SMWIA group has scheduled meetings with school superintendants and facilities directors—the decision makers who will determine how to spend facility improvement funds.

“Our plan is to jointly go out and market ourselves as an industry,” says Joseph Sellers, Jr., president and business manager for the local. “One of the messages we are trying to get out is we have the expertise and are well positioned and ready to meet the energy efficiency and weatherization demands with our trained workforce.”

At the national level, SMACNA has distributed a Contracts Bulletin that explains changes to federal acquisition regulations that govern contracts directly procured from the federal government and some local and state governments.

Kolbe, who works at the national SMACNA Capitol Hill office, says layers of Federal project review and contract accountability documentation have somewhat slowed the flow of stimulus money, but funding is clearly on the horizon as envisioned by the White House.

“The money is on the way. There’s no question,” he says. Kolbe suggests contractors interested in public sector work use any lead time to connect with their local SMACNA and SMWIA offices to see what resources are available and identify what types of projects are being funded in their region. They can also visit with Federal, state and local officials responsible for the procurement decisions underway now.

Go for it

McKinstry, a union construction contracting firm based in Seattle, Wash., gained national attention when then president-elect Barack Obama visited the company’s facility along his campaign trail. In an ad, Obama highlighted McKinstry as the kind of company that will help the country create a new economy based on energy efficiency.

Senior Construction Manager John Gundlach attributes much of McKinstry’s success to growing its energy efficiency expertise and to being assertive. He says that attention to quality and performance is important for winning stimulus jobs.

“These are not ‘bid cheap to get in and get out’ jobs. You need to learn and represent what performance guarantee really means,” Gundlach explains. “You babysit these jobs for performance past completion; you just don’t walk away from them.”

Gundlach also recommends establishing or strengthening connections with politicians and government officials, which means regularly attending meetings and hearings and getting to know the decision makers.

“Let people know you’re interested. You have to be proactive and go after the work,” he continues. “If you’re a union

contractor, don’t shy away from these jobs. Make yourself marketable and presentable.”

Gundlach expects union contractors to be well positioned for the coming work because the Davis-Bacon Act is being applied to stimulus funded projects. “They will require use of prevailing wage regulation of workers,” he says. “That should help equalize the playing field.”

In California, where some funds are also being directed to the residential market, SMACNA and SMWIA representatives are keeping current on developments through the Joint Committee Energy and Environmental Policy to give them a head start on projects.

“The more involved you get with the political agencies that are applying for the money, the closer you are to the tap when it finally opens,” says Marina’s Hussey, a member of the committee.

Good for industry and country

Stimulus funds may counter the downturn in the private sector construction market. SMACNA’s Kolbe says that for the first time in decades, there will be more work bid from the public sector than the private sector. “It’s been a complete about face.”

On top of the stimulus funds, the Federal government is pumping money into the economy from its financial institutions at many levels. Various federal appropriations will fund energy efficiency projects that are desperately needed as the nation plays catch-up from a period where energy efficiency and green construction were not a federal priority.

“Congress didn’t go out of business when they passed the stimulus bill,” Kolbe explains. “They were just getting warmed up. We can expect many more bills with energy efficiency initiatives in them.”

He says that most of the Federal buildings being targeted for upgrades are “pathetic” with regard to energy efficiency and will provide excellent return on investment for taxpayers.

“This work is vital in the national interest. It just makes economic good sense,” Kolbe adds. “And it’s a great story for our industry that we will play a major role in making this nation one of the most efficient.”

Hussey says pursuing stimulus funds provides a wonderful opportunity for labor and management to come together across the country. “Not only can we be assured of receiving our share of the stimulus dollars, but also we can lay the foundation for future joint efforts.”

He says he has seen first hand how labor and management can work together, maximizing the return on each of their political networks for the protection and expansion of markets for the organizations’ respective members.

“We can truly be partners in progress!” Hussey insists. ■

Grieco is a freelance writer based in Blacksburg, Va.

“The money is on the way. There’s no question.”

Turn Green Into Gold

SMACNA and SMWIA's green credentials are in the history of what they do.

by Cairine Caughill

Sustainability. Energy efficiency. Green. Environmentally friendly. Carbon footprint. Not just passing buzzwords, these words have become benchmarks for environmental awareness.

According to SMACNA's *HVAC Contractor's Guide to Bidding Green Building Projects*: "All indications are that high-performance buildings are not a passing fad and that green buildings are moving into the mainstream of the U.S. construction industry."

In response to rising concerns about the environment and increasing energy costs, more and more owners are requiring that their projects be designed and constructed in an environmentally responsible manner and that their buildings be recognized through third-party rating systems.

Robert Donat of Key Air Conditioning Contractors, Inc., in Santa Fe, Calif., estimates that 25% of the company's work can be classified as green, a number that is on the rise. "Even buildings that aren't currently trying to attain certification are being built to green standards," he says.

Federal agencies and state and local governments are leading the charge toward energy efficient buildings by pouring money into building renovation and retrofitting existing buildings to be green.

As of June 1, the U.S. Green Building Council's Web site reported that government-owned or -occupied LEED buildings made up 29% of all LEED projects. "The Federal government has 143 certified projects and another 1,850 pursuing certification. State governments have 237 certified projects and 1,704 pursuing certification. Local governments have 362 certified projects and 2,621 pursuing certification."

Though some of the terminology is new, union contractors and labor are no strangers to environmental consciousness. In fact, the increased environmental focus is an opportunity

for organized sheet metal to showcase its knowledge and current practices.

Dan Andrews, training director for SMW Local 36, points out, "Anyone who has been trained in testing, adjusting and balancing, indoor air quality and energy management has been doing 'green' work since the 70's—maybe longer."

John Hamilton, assistant director of Certification at National Energy Management Institute (NEMI) agrees. "We've been a green industry for the last 25 years. We meet the green needs, and we're the ones that make the systems energy efficient through our installation practices...making systems more efficient by adding insulation, running good quality control, and using test and balance firms to check their work."

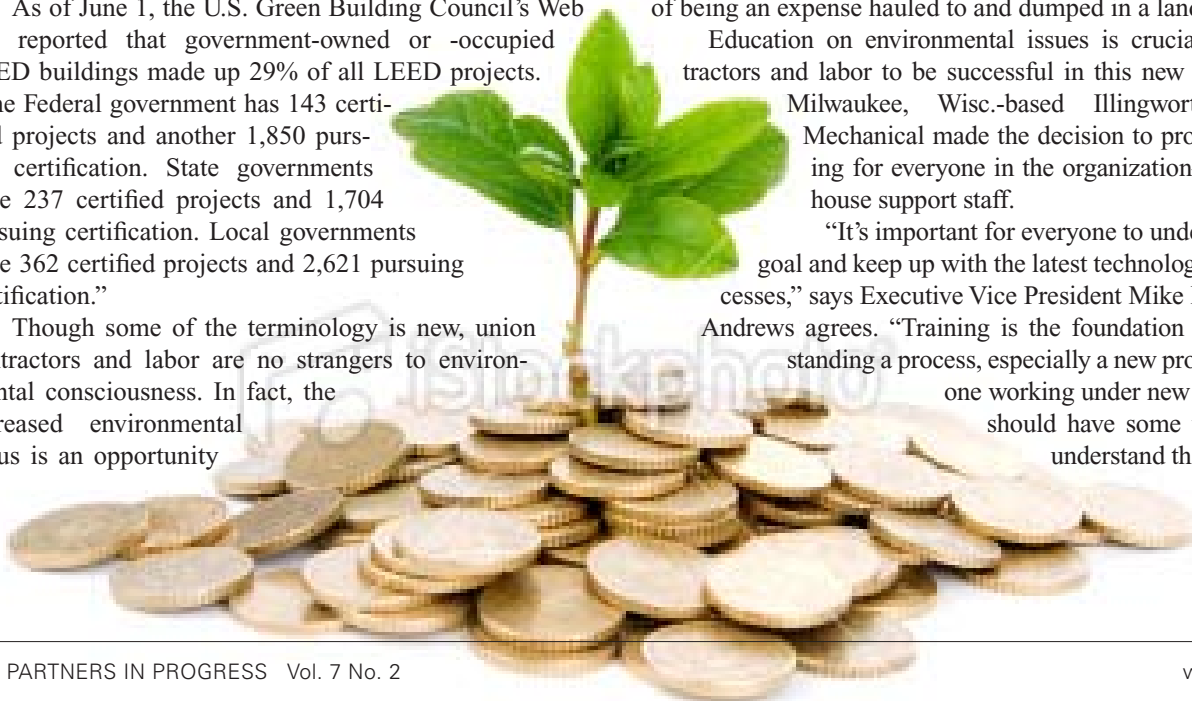
He says that union contractors and labor need to get into the mindset that their green credentials are in the history of what they do. "We're the green people when it comes to HVAC systems."

SMACNA and SMWIA are ahead of the curve in waste segregation, as well. Rob Biedermann, president of JB Henderson Construction in Albuquerque, N.M., says his company has been segregating waste for some of its clients for years.

He's witnessed the win-win on a demolition project, where scrap steel and crushed concrete was sold for a profit instead of being an expense hauled to and dumped in a landfill.

Education on environmental issues is crucial for contractors and labor to be successful in this new landscape. Milwaukee, Wisc.-based Illingworth-Kilgust Mechanical made the decision to provide training for everyone in the organization—even in-house support staff.

"It's important for everyone to understand the goal and keep up with the latest technology and processes," says Executive Vice President Mike Mamayek. Andrews agrees. "Training is the foundation for understanding a process, especially a new process. Anyone working under new guidelines should have some training to understand their role."



Biedermann says his company made a conscious decision to become educated in LEED. “The unknown leads to higher costs. The unknown leads to concern....We needed to do it together, and that’s what we did.”

JB Henderson has superintendents and even management staff who have taken and passed the LEED exam. “We want the team to understand this so we can work together to implement it. And then there’s no mystery in any of it,” Biedermann says.

Another reason to push LEED, adds Biedermann, is that it gives contractors and labor a chance to think creatively. “What would have been considered way out-of-the-box thinking five years ago is now almost a requirement. We are forced to think in new ways about how to balance the owner’s ultimate cost constraints.”

Cost can be a challenge when it comes to “green” and energy efficient projects. “Trying to balance the customer’s cost pressures or cost limits with the cost of new environmental efficiencies is not easy,” Biedermann says.

“Fortunately, customers are thinking more long term, recognizing that, though the upfront costs are steep, the ultimate savings and other benefits pay off long term. They’re also recognizing that not all benefits are quantifiable.”

As more and more customers choose energy efficient and green buildings, demand should drive down prices. Donat believes costs are already on the way down because LEED is becoming the norm. ■

Caughill is a freelance writer based in Ontario, Canada.



From Asparagus to Viridian:

The Many Shades of Green Contracting

Excerpt from SMACNA's HVAC Contractor's Guide to Bidding Green Building Projects, Second Edition, May 2009.

HVAC systems are a key element of any green building from both an energy and indoor air quality (IAQ) standpoint. It is covered in various Leadership in Energy and Environmental Design (LEED) standards published by the U.S. Green Building Council (USGBC). Types of requirements sheet metal contractors might encounter on a green building project include:

- **Building Commissioning.** HVAC contractors should be aware of any commissioning requirements on their projects. If criteria are vague, contractors could be at risk.
- **Construction Waste Management.** Meeting construction waste requirements typically means minimizing the amount of demolition and construction waste sent to a landfill. Such efforts may mean increased costs for tracking waste and moving it to recycling areas. Some costs can be offset by retaining the proceeds from salvaged materials and equipment.
- **Construction IAQ Plan.** Requirements include preparation and implementation of an IAQ plan to protect the HVAC system from contamination during construction and to provide a healthy environment for construction workers and occupants. Success in this area requires coordination and cooperation among the trades as well as the general contractor or construction manager.
- **Ductwork & Air Handling Equipment Delivery & On-Site Storage.** Protecting HVAC systems from contamination during construction includes protecting ductwork and other air handling equipment from contamination by dust and moisture prior to installation.
- **Pre-Occupancy IAQ Plan.** In addition to managing IAQ during construction, requirements cover pre-occupancy IAQ management plans to reduce IAQ problems resulting from construction activities and promote the well being of building occupants. Strategies include a

pre-occupancy flush-out of the building after completion and prior to occupancy, a combination pre- and post-occupancy flush-out, or air testing.

- **Use of Solvent-Based Adhesives & Sealants.** LEED requirements cover use of adhesives and sealants that emit low-levels or volatile organic compounds to reduce indoor air contaminants both during construction and after occupancy

Understanding how HVAC systems and LEED interact is not a small matter, particularly since the requirements recently changed. It used to be that someone who had taken and passed the test was known as a LEED AP. Now there is a three-tier ranking system.

The first level is LEED Green Associate. This credential indicates a general overarching knowledge. To gain this credential, an individual must take and pass a two-hour exam at a testing center.

The second level is LEED AP. This denotes specialized knowledge in one of the five following categories: Homes; Interior Design and Construction (ID+C); Operation and Maintenance (O+M); Building Design and Construction (BD+C); Neighborhood Development (ND).

Testing for this level is in two parts. The first test is the same one the LEED Green Associate has taken and passed. The second part is specific to one of the five categories listed above.

LEED Fellow is the category for the most senior people—those who are designing buildings and overseeing projects. This category is still being developed.

For additional information on LEED Version 3, visit the USGBC's Web site at usgbc.org/leed or review SMACNA's *HVAC Contractor's Guide to Bidding Green Building Projects*. SMACNA has also published a Technical Resources Bulletin on LEED Version 3. It is available at smacna.org/pdf/ACF1521.pdf.

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Charting the Path... *Together*

Partnership programs allow SMACNA and SMWIA to take steps in the direction of prosperity.

by Cari B. Clark

Union market share fell from 62% in 1984 to 37% in 2007. Further, although 59% of Americans say they approve of labor unions, more than 30% do not. So how do signatory contractors get back on top, especially in an economy where everyone is poring over the bottom line?

Contractors, chapters, locals, and training centers across North America are brainstorming answers to this question by participating in partnership meetings. Smaller local conferences are paving the way to the national Partners in Progress Conference in Las Vegas, scheduled for spring 2010.

Mike Gaffney, former faculty member of the Cornell University School of Industrial and Labor Relations—and now a consultant—facilitated *search conferences* for SMACNA St. Louis/Local 36 and SMACNA Kansas City/Local 2.

“These conferences allow two parties to discover what they want and need to do to begin sorting out the issues. They also provide an opportunity to commit to a plan for subsequent follow-up.”

Gaffney thinks the conferences are successful because there’s no ‘director’ telling the parties what to do. “We hold small group discussions and general sessions so participants will generate their own ideas and prioritize action items.”

In Kansas City, about 35 SMWIA members and SMACNA contractors worked separately in the beginning to trace the history of the local and chapter and examine historical trends related to the customer base, workforce characteristics, tools and materials, and market share. They determined that

- during the 60s, SMWIA members trained once—for life—and they worked all segments of the industry; pay for non-union workers was fairly comparable to union wages;
- during the 70s and 80s, the industrial boom lured union members away from residential and light commercial work, and shop work started to drop off due to technological innovations;



- by the late 90s, the union and contractors started changing their attitudes and creating a partnership; and
- today the workforce needs to be trained in new technologies, and to complicate matters, the cost differential between union and non-union shops is significant.

Once the contractors and union members agreed on where this historical trajectory was taking them if left unchecked, they worked in separate and mixed groups to come up with a preferable view of the future.

Next they generated a list of innovations, activities, and projects that could help them move toward that desired future state.

For this task, attendees divided into mixed groups, with union members and contractors working together.

“I’d challenge any observer to tell which are contractors and which are workers,” says Jack Goldkamp, owner of Design Aire, Inc. of St. Louis.

So close, congenial, and productive are these groups that Goldkamp feels the partnering conferences, both national and local, have been invaluable for his business. “They’ve been very cost-effective because of the time and energy of the participants over the years,” he says.

In the mixed groups, participants brainstormed ideas and prioritized action items. “Of course, some of these ideas generate more energy and interest than others,” Gaffney says.

The product from these groups was a list of several dozen projects. Each participant voted with his or her feet to choose one item to work on for the remainder of the conference. “Usually, participants choose between three and 10 items for more intensive work,” Gaffney says.

On the second day, participants went to work in groups dedicated to the action item they chose. They began to develop solutions or action plans for their selected topics.

“In meetings like this, some topics are relatively non-controversial, such as ‘develop a marketing plan,’ while others

continued on page 11

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continued from page 9

may entail difficult conversations, such as ‘make better use of classifications, ratios and flexibility,’ Gaffney notes.

For touchy issues, Gaffney demonstrates how interest-based negotiation techniques can help the parties work together constructively.

Groups then pitched their recommendations to the entire conference and got reactions and comments.

“After individuals and institutions (chapter and local) made commitments to follow up, we concluded the conference with an action plan on a handful of significant topics,” Gaffney says.

As a facilitator, he discourages overly ambitious, ambiguous pie-in-the-sky initiatives. He encourages participants to select realistic, concrete, achievable goals they can be excited about—and commit to.

As a result of their partnership meetings and search conferences, a new hall and training center are currently on the drawing board for Local 36 in order to implement state-of-the-art training, especially in the emerging Green Building sector. The recent New Horizons Foundation study was the basis for many of the initiatives currently being developed and implemented in St. Louis.

This approach has been extremely beneficial for SMACNA St. Louis and Local 36, says John Lueken, executive vice president of SMACNA St. Louis. Lueken credits the Partners in Progress conferences and local partnership meetings with helping them maintain their share of the market during the economic downturn.

They have been working together and have successfully built market share in all sectors since they began partnering in 1999. “January’s meeting was the best labor-management meeting I have ever attended. Partnership is the culture now,” he says.

“We have all worked hard. We continue to have an open-door attitude and the free exchange of ideas. Problems get resolved right away,” Lueken concludes.

Dave Zimmermann, president and business manager of Local 36, agrees. “We have a long-range planning committee. We’ve tried to stay ahead of the upswing and have been watching emerging markets, such as Green Building, TAB, and add-on replacement.”

Zimmermann implemented OSHA training and mandatory drug testing shortly after he took the helm in 1999, saving money for Local 36’s health and welfare program. He has also emphasized continuing education. “If we don’t have the best-prepared workforce out there, we have nothing to sell,” he explains.

“We have a great workforce—they’re well-trained, with a good work ethic. But we have to work together [with contractors] as a team. We don’t care who gets the credit: we do what’s best for our industry.” ■

Clark is a freelance writer based in Springfield, Va.



Local and National Efforts Augment Partnership

At a partnership conference in New Jersey, Mark Breslin—an industrial relations strategist and industry speaker who has addressed audiences at the last two Partners in Progress conferences in Las Vegas—spoke with contractors and members of SMWIA Local 25.

He emphasized a commitment to excellence as the way to improve market share and the perception of unions among customers. “Think of the best consumer brands—

none of them sell because they are the cheapest. Customers will pay more if they believe they are getting value for that extra cost.”

Breslin also advocated adopting and implementing the Code of Excellence to bolster credibility with owners and others who might have negative connotations of what it means to hire Union workers and contractors.

His message was similar to SMACNA Mid-Atlantic and Local 100, representing the Washington D.C. area. (See *Partnership Communicator*, Vol. 4, Issue 1.) He encouraged every contractor, apprentice, and journeyman to be personally involved in the direction organized sheet metal is heading.

“Decide if you are motivated enough to be partners and to make a difference in the status quo.” Breslin’s overall goal is to transform the union construction industry and restore its competitive position in the marketplace.

Breslin returns to take center stage at the Partners in Progress Conference, March 18-20, 2010, in Las Vegas at Caesars Palace. The conference theme is *Driving Change. Creating Opportunities*.

Sheet metal contractors, local union leadership, training coordinators, and SMACNA chapter executives seeking to improve industry relations and create work opportunities that benefit both labor and management should plan to attend.

New to this year’s program, 500 of the top apprentices will be active participants in the program. A leadership track to guide the apprentices through the spectrum of market opportunities and a one-on-one focus group with Breslin are planned.

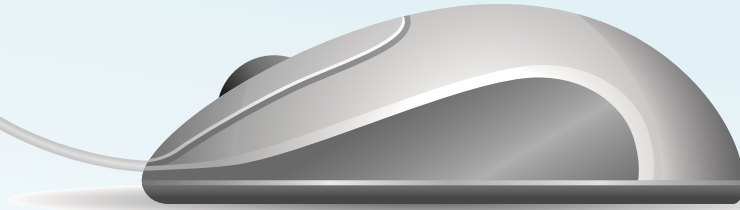
The International Training Institute (ITI) has eliminated regional competitions, allowing all local apprentice contest winners to participate in the International Contest. The cost of eliminating the regional contests offsets the costs of the expanded International Contest.

In addition, apprentices will be encouraged to stay an extra day and a half and attend the Partners in Progress Conference at the cost of a reduced Partners In Progress registration fee and accommodation.

The partnership conference will feature breakout sessions covering regional issues, problems, and solutions. Participants will be encouraged to engage in one-on-one brainstorming.

For more information, check the Partners in Progress Web site at pinp.org.

@ Your Fingertips



Tools from SMACNA and SMWIA grease the wheels for local partnerships

by Jim Pierzynski

When SMWIA and SMACNA held the first Partners in Progress Conference in February 2000, national leaders exuded optimism that the renewed spirit of partnership would filter to the local level.

That confidence has proved worthwhile. In the past nine years, many local partnership groups have formed and there is greater cooperation between management and labor even in areas with no formal labor-management cooperation trusts.

In the meantime, national and local partnership organizations have developed several resources to support partnering efforts, including the Best Practices Market Expansion Task Force, this magazine—which published its first issue in 2002, the expertise branding program—with logos and Web sites, webinars, a social networking Web site, newsletters, conferences, videos, a photo library, and more.

Below are snapshots of some of these resources and how to use them to bolster local partnerships.

Sheet Metal Network

➔ sheetmetalnwork.org

A recent innovation, developed in response to suggestions at the last PinP Conference, is a social networking site for the organized sheet metal industry. It provides a forum to share questions, answers, experiences and ideas with friends, colleagues, mentors, and partners across North America.

Within the site, it's possible to put together smaller groups for those with common interests, such as individuals in the same local, chapter, JATC, or those working for the same contractor. Groups can participate in their own forum discussions or post photos and videos.

Existing groups include ones for HVAC Expertise, green job possibilities, training, and locals. More than 300 members, including SMWIA members and SMACNA contractors, have joined since November 2008.



Among the resources available on the Sheet Metal Network is a video archive containing successful local programs and projects. The videos focus on recruiting, selling value, training, and a high school construction program aimed at attracting more young people to the construction industry.

Partners in Progress Web site

➔ pinp.org

This site is an online clearinghouse containing more than a hundred educational, marketing, and business management resources that can be used in local sheet metal partnership efforts.

It's also possible to download licensing agreements that allow contractors, locals, chapters, and training centers to use the Expertise logos on letterhead, signs, shirts, and in other branding efforts.



Other resources on the site include SMACNA, New Horizons, and LMCC publications that can be used for educating local partnership participants, as well as external groups; and presentations from previous national partnership conferences. Additionally, there are links to local partnership-related Web sites (pinp.org/mktg/local-labor.htm) and an order form to obtain copies of the *Live Up to the Promise* DVD.

Partners In Progress magazine

➔ pinp.org/resources/#pinp

Partners in Progress magazine assists members of both sponsoring organizations with cooperative efforts, programs, products and services aimed at enhancing opportunities for members by meeting the needs of customers.

In the 24 issues published since 2002, it's possible to find many real-world examples of how partnering efforts have led to increased business opportunities for many SMACNA contractors, and subsequently more work opportunities for the skilled SMWIA workers those contractors employ.

Expertise Web sites

IndustrialExpertise.com

Contractors, locals, chapters, and training centers can use the Industrial Expertise Web site as an online marketing resource showcasing the expertise of signatory sheet metal contractors. It provides case studies, discusses the importance of Industrial Construction Standards, and provides a link to find SMACNA contractors.

HVACExpertise.com

Today, more than ever, homeowners and building owners/managers find it challenging to find qualified contractors to service the heating and air conditioning in their home or building. To showcase the advantage of selecting signatory sheet metal to do this work, the Labor-Management Cooperation Fund developed this Web site.

On the site, a 30-second flash movie provides an overview of how important it is to have a properly functioning heating and air conditioning system and an HVAC Expertise contractor to install and maintain that system. It provides a link to find SMACNA contractors.

ASM-Expertise.com

Architectural Metal Expertise contractors provide the greatest range of architectural metal products and services available to the design community. This Web site describes how these experts, who employ the construction industry's most experienced and well trained craftsmen, work with architects, designers, builders, and owners to design and create award winning architectural metal projects that are developed and produced by combining old-world craftsmanship with cutting edge technology. It provides a link to find SMACNA contractors.

Twitter sites

Social networking is here to stay for the long-term. One aspect of it is "tweeting" (an update sent using the text messaging tool *Twitter*), which has taken the business world by storm. Organizations of all sizes are making Twitter work for them, establishing connections and social circles, growing their brands, and keeping members updated. Within the past year, SMACNA, SMWIA, and *Partners in Progress* have added Twitter capability to keep members informed about the latest legislative, market expansion, and partnership efforts and more. Subscribe (or follow) by visiting the following sites:

 twitter.com/smacna

 twitter.com/smwia

 twitter.com/smpartners


SMACNA, SMWIA and related Web sites


SMACNA, SMWIA, and other organizations associated with the organized sheet metal industry offer numerous Web sites containing valuable partnership resources, including news,

videos, blogs, podcasts, Facebook groups, Twitter links, and publications available for download. Check out the following:


 SMACNA.org—SMACNA


 SMWIA.org—SMWIA


 smacnatri.org—SMACNA Testing and Research Institute


 nemionline.org—National Energy Management Institute

 newhorizonsfoundation.org—New Horizons Foundation

 smohit.org—Sheet Metal Occupational Health Institute Trust

 sheetmetal-iti.org—International Training Institute

 tabbcertified.org—Testing, Adjusting and Balancing Bureau

 ncembt.org—National Center for Energy Management and Building Technologies

Webinars

In the past two years, SMACNA has offered eight webinar programs on such diverse topics as *The Kick-off Meeting*, *Handling Difficult Customers*, *the SMWIA's New Code of Excellence*, *Building Information Modeling*, *Strategies for Navigating a Turbulent Market*, and *HVAC Duct Construction Standards*.

For one low price to the local contractor, chapter, or related group, all relevant employees and local representatives can attend these educational programs. For instance, the *LEED in Construction* webinar targeted management, project managers, estimators, and foremen.

These webinars provide educational opportunities to local SMACNA and SMWIA representatives that would be cost prohibitive through traditional face-to-face educational formats.

Sheet Metal Photo Library

SMWIA and SMACNA have combined forces to catalog and make available on DVD 1,900 photos of HVAC, architectural and industrial sheet metal specialty areas. SMACNA's safety director has also reviewed each of the photos for potential safety violations.

These photos are FREE and available for use by SMWIA and SMACNA members in ad campaigns, on Web sites, and for other public relations purposes. Contractors, locals, chapters, and JATCs may order copies of the CD. Further, they may duplicate it and distribute it to SMACNA and SMWIA members. To obtain a copy of the CD, contact Kaarin Engelmann at kaarin@pinp magazine.org. ■

Pierzynski is a Florida-based writer with previous experience on SMACNA's staff.

Clearing the Trail

NEMI and SMOHIT provide essential tools for expanding markets.

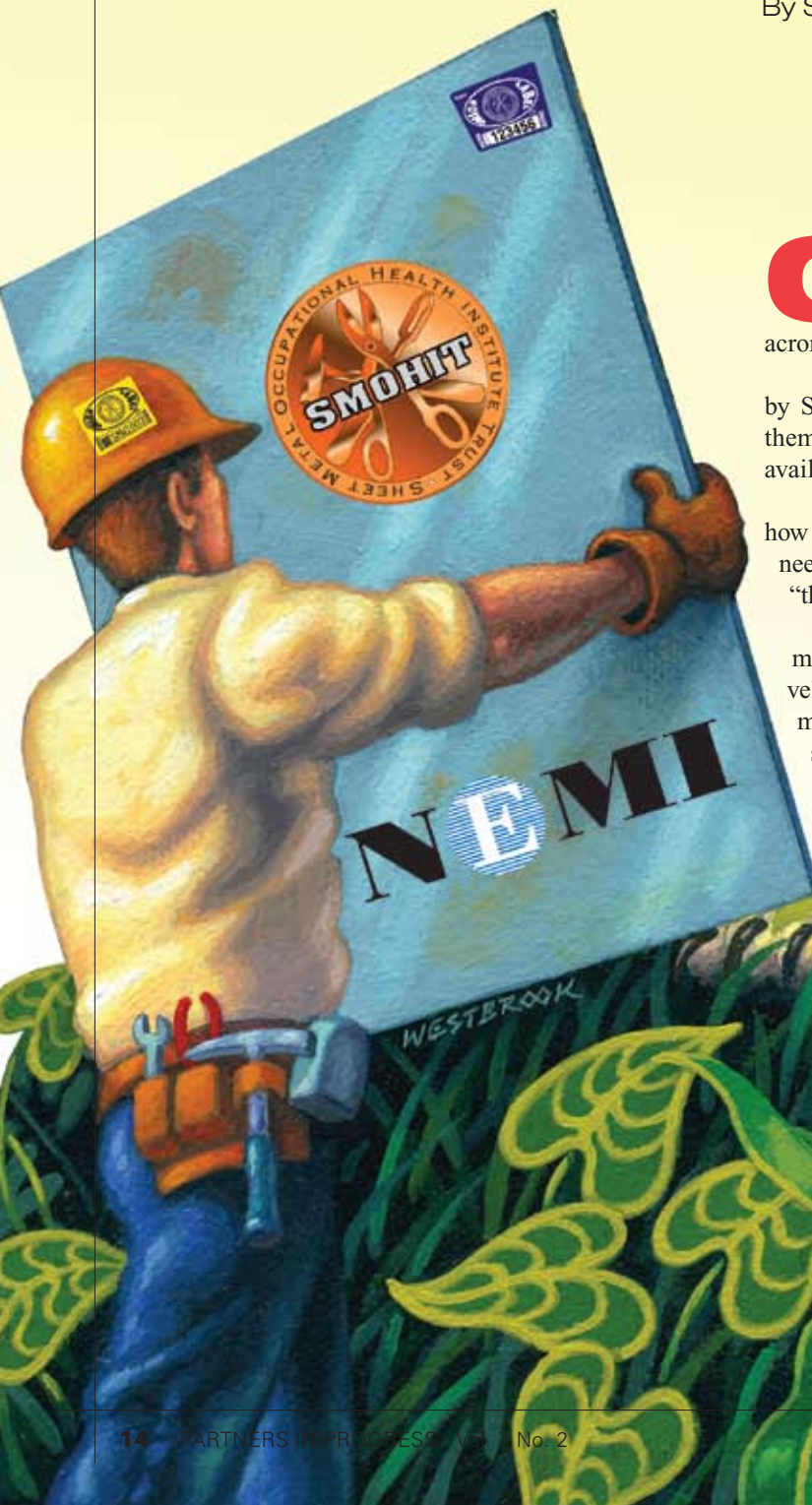
By Skip Maloney

Out in the field, it's easy to believe the National Energy Management Institute (NEMI) and Sheet Metal Occupational Health Institute Trust (SMOHIT) are just acronyms that pocket a few cents of every dollar earned.

Digging a little deeper, though, these organizations funded by SMWIA and SMACNA are about signatory jobs—getting them, keeping them, surviving them, and making more of them available.

“Although these trust funds provide concrete examples of how management and labor can work together to address the needs of a changing industry,” says NEMI’s Tony Picarazzi, “their benefits are often overlooked or lost in translation.”

NEMI’s primary mission is to identify emerging markets and employment opportunities and then develop programs that capitalize on them. SMOHIT’s mission is to develop and promote health and safety resources to create a safer, injury-free workplace.



Yet, what use is identifying new opportunities if contractors don't actively pursue the work, and do state-of-the-art safety programs really make a difference if workers (and safety directors) fail to understand their importance or implement their provisions?

Without a heightened awareness of NEMI's and SMOHIT's value, contractors and union sheet metal craftworkers could well find themselves in a situation where they don't have to worry about their day-to-day concerns, because the work isn't there for them to worry about.

National Energy Management Institute looks ahead

According to a recent NEMI report, the total industrial ventilation market could grow by 17% between 2008 and 2010, with cumulative growth expectations stretching to 56% by 2013. As a result of this growth, the industry will need to increase its full-time technician workforce from its 2008 level of 1,600 to 2,320 by 2013.

On the surface, this looks like good news. The trouble is that a lot of this growth will happen in emerging markets that many existing contractors and craftsmen aren't familiar with and are ill-prepared to capture.

"It's like telling a vegetarian that I know of the best steakhouse in town," says Tony Picarazzi, NEMI's administrator. "That's how some people perceive NEMI."

In this case, the best steakhouse in town is serving Building Commissioning, Energy Management, and Indoor Air Quality (IAQ), requiring skills associated with adjusting and balancing of HVAC systems, energy audits, and testing.

Making these skills even more significant is that they are transitioning from "good ideas" to "mandatory."

In the near future—or in some cases today, if a sheet metal contractor wants a piece of any government-building project, he or she will need to comply with strict guidelines and have a highly skilled and certified workforce capable of meeting those standards.

"It's a Catch-22," Picarazzi says. "You can't train members of a union to do the work unless there are contractors pursuing that work, and you can't get contractors to pursue the work unless there are members trained to do it."

To receive a Certificate of Occupancy in Colorado, a building must not only meet standards set for fire alarm safety, but must also show that it has undertaken the testing, balancing, and adjusting of its ventilation system, says Greg Glendenning, field superintendent for Superior Balance and Commissioning in Fort Collins.

"In any given local, out of 1,000 members, only about 25 are certified in testing and balancing. Demand for this type of work already exceeds the labor supply and the gap is going to increase," he says. Industry contractors will have to adapt.

"How can we survive in today's economy and into the future if we don't adjust our company's business model for new and emerging markets?" Glendenning says. "The question we should be asking is 'How do I broaden my skill set to be prepared?'"

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NEMI Resources Available for Download

NEMI's Web site at nemionline.org/downloads offers a plethora of studies, applications, articles, newsletters, and presentations available for download. Here is a list of just a few:

IAQ for Schools Federal Government Study "The Condition of America's Schools"

HVAC Market Research In accordance with NEMI's new strategic plan, several task forces were commissioned to evaluate emerging and existing markets in our industry. Each section has an executive summary with key points regarding its mission and findings. FMI, our research consultant, was instructed to conduct these surveys.

Moisture Management Market Opportunities There is significant potential in providing products and services related to moisture management in building.



SMOHIT Resources Available for Download

SMOHIT's Web site at smohit.org offers Toolbox Talks in text, audio, and video format, as well as newsletters, fact packs, and a variety of training products on CD-Rom, DVD, in print, and on VHS. Here is a list of just a few:

Calling 911 Cast A video about developing a quick response and knowing what to do when dealing with emergency situations.

Proper Lifting Techniques Toolbox Talk

Handling Compressed Gases Toolbox Talk

Survival Case Study:

Stockton, Calif.

Take a compass bearing on the path toward successful labor-management cooperation.

Mike Gaffney, former Cornell University School of Industrial and Labor Relations faculty member, researcher, author, and trainer, provides his thoughts on how to put together a successful labor management partnership. He does it in the context of one of the newest labor-management teams—Stockton contractors of SMACNA's Northern San Joaquin Valley Chapter and SMWIA Local 162.

Successful labor management cooperation efforts are often grounded in a history of largely unrecorded—yet respectful—discussions on a wide range of issues. In Stockton, several significant events led up to today's visible and formalized partnership effort.

- 2003—Negotiated classified worker provisions;
- September 2007—Visited by out-of-state residential service contractor Butch Welsch;
- January 2008—Sponsored market recovery strategic planning seminar and established continuing committee and working subcommittees; and
- July 2008—Negotiated new contract including new and current Standard Form Union Agreement, service work addendum, premium pay for on-call service technicians and established a labor management cooperation committee (LMCC) and labor management cooperation trust (LMCT).

Relationship

Contractors of SMACNA's Northern San Joaquin Valley Chapter and members of SMWIA Local 162 report that they have been working well together for years. They are especially proud of their continuing efforts promoting technical education within area high schools.

Chapter Manager Mark Bowers and Business Manager Dennis Canevari meet informally on a regular basis. No doubt this relationship has contributed to their history of successful contract negotiations.

Focus

Stockton's labor management effort is focused on recapturing market share in residential and light commercial service and retrofit work. Although roughly half of Local 162's members work in service positions, SMACNA and SMWIA estimate that their team controls less than 10% of that market.

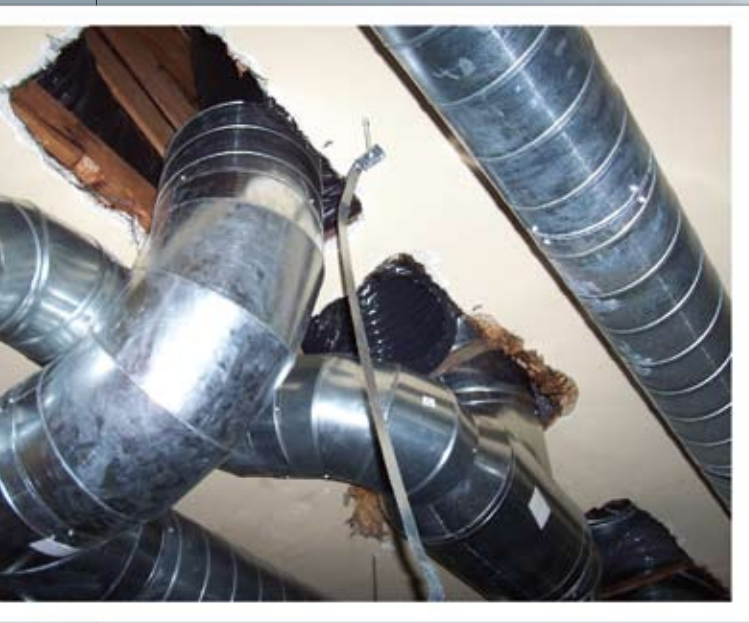
That low number is the reason the chapter invited Butch Welsch of Welsch Heating and Cooling Co. to explain how he built a successful business around this type of work in St. Louis.

Area contractor Matthew Smith, of Smith Heating and Air Conditioning Inc., had been a member of the national Best Practices Market Expansion Task Force and was familiar with Welsch's success. He was of the opinion that individuals and organizations often need to see a concrete example of what is possible before they commit resources to an undertaking.

Butch's day-long seminar was not so much a motivational speech as it was a description of how his business works—long on specifics, including such practical advice as the importance of getting paid right away and the advantage of maintenance agreements. As a result of this visit, more contractors signed onto the plan of expanding into residential service work.

Strategic plan

Components of a change effort are rarely seamlessly coordinated. More often than not they are cobbled together. Stockton is a case in point. The parties negotiated work rules and job





classifications that could mitigate the cost differential between union and

non-union service work long before they had a plan in place to allow them to use the new provisions.

For the Stockton folks, it was a strategic planning conference held four months after Welsch's visit that provided a coordination function.

With financial support from the national LMCC, local parties contracted with FMI—a construction industry management consulting firm—to run a two-day event that produced agreement and commitment between the union and contractor participants on the pursuit of three specific goals:

1. increase market share in this particular segment,
2. promote awareness of union entry into this market, and
3. provide a steady supply of workers.

To pursue these goals, participants established a steering committee and, underneath it, formed three subcommittees. These groups continue their work 18 months later. One item emerging from those discussions was use of a \$25 or \$50 rebate program.

A few months after SMACNA and SMWIA formed the committees, with the 2008 negotiation, they created a local LMCC and a supporting LMC trust funded at 20 cents per hour. Further, they added 6 cents per hour to their local industry fund for promotional and marketing purposes, with new training functions handled by the existing training program.

Funding/marketing

Many construction industry LMCs are supported by LMC trusts funded by cents per hour contributions. Generally, these funds are used for promotional purposes.

That's the case for Stockton. Their initial plans include expansion of their HVAC Expertise Web site, support of specific charities, and sponsorship of a minor league baseball team (including program ads, stadium signage and giveaways). They have recently hired a marketing firm with a long term plan to promote this particular market in their area.

Though not a problem for Stockton, less focused labor management partnership efforts accompanied by trusts may fall into a promotional/advertising rut where they spend most of their energy figuring out how to spend their money.

If the principal reason for loss of market share in union construction was that clients just didn't know what a good product union folks had to offer, then this heavy weighting of advertising activity would be just the thing.

But non-union competition has gotten quite a bit smarter and better since they first made inroads 30 years ago, and they

Trickle Down Effect

Partnership is not only good for the signatory sheet metal industry, but also it can help the local community. In Stockton, the connection is obvious. Their unemployment rate hovers at about 15%, while many in the construction field are engaged in an endless and sometimes fruitless search for skilled workers.

"We need to maintain a local work force," says Matthew Smith, owner of Smith Heating and Air Conditioning Inc., a signatory contractor based in Stockton. "Our workforce is aging, and there are not enough workers in the trades to accomplish the significant amount of work going on in California."

As a result of labor-management partnerships across the trades, Stockton established a construction academy at the local high school with programs in mechanical construction, construction technology, and architecture and computer-assisted drafting. Classes simultaneously grant high school and San Joaquin Delta College credits. More than 450 students are signed up for 2009-2010. (See the Lincoln High School Construction Academy video on SheetMetalNetwork.org.)

"This sort of effort is what comes out of working together," Smith concludes.

now offer some advantages to clients—principally, cost—that cannot be countered by advertising alone. It's necessary to identify a better mousetrap to sell.

Work redesign/R&D

Throughout the country, union response low-cost non-union competition has ranged from direct subsidy of some jobs (target funds) to redesign of the way jobs are staffed and run.

The latter approach entails various combinations of higher apprentice/journeyman ratios, additional training, flexible work rules, higher standards of worker virtues (codes of conduct) and new classifications of workers not on the traditional apprentice/journeyman track.

Thus far, Stockton has redesigned its work practices by changing the journeyman/apprentice ratio from 2:1 to 1:1—not only for purposes of cost reduction but also to more aggressively recruit new people to the trade.

- They have instituted a requirement for ongoing journeyman training (at least eight hours per year) at no cost to the employers or the journeymen—financed by their local training program.
- Back in 1989 they adopted the Standard Form Union Agreement into their contract, and then last year replaced it with the 2007 SFUA provisions providing flexibility.
- They have adopted a new service addendum allowing greater flexibility in working conditions in order to

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meet residential and light commercial customer schedules. For example, the eight-hour workday can now be scheduled any time between 6:30 a.m. and 6 p.m. Also, regular workdays can be scheduled any time between Monday and Saturday with two consecutive days off.

- Since 2003, they have had in their contract five levels of classified workers with corresponding levels of pay and benefits.
- All their technicians will have achieved the North American Technician Excellence (NATE) certification and can be trained and certified within their own training program.
- They now provide premium pay (in addition to overtime pay) to technicians on-call for emergency service after hours and on some weekends and holidays.

The Stockton experience in this regard mirrors that of many labor contracts in which new provisions are negotiated but not initially used. It takes a comprehensive strategy and plan to bring all the pieces together and that perhaps is what is most noteworthy of the Stockton experience to date. LMCCs can also provide to chapters and locals an R&D function that was previously missing. This is where the better mousetraps come from.

Leadership

It also takes leadership. I pointed out earlier that big change is facilitated by a relationship of trust between the two parties, which in turn, is based upon a history of working together on a variety of stuff. That's also true of the relationship between leaders and their followers. If leaders have earned the trust of the folks they represent (on both the union and contractor sides), then it is much easier for them to move their respective constituencies in new directions.

Informal leadership functions can also be exercised by folks other than the chapter manager and business manager. In the Stockton case, the chapter manager and business manager both credit Matthew Smith's persistent energy and enthusiasm with advancing this particular cause.

Constituents

Leadership alone cannot accomplish change. If leaders get too far ahead of their constituents, they run the risk of losing them—and the desired changes. Some labor management partnerships are short lived and of limited impact because of the small number of individuals involved—the usual list of suspects recruited from the top ranks of the chapter and local.

Successful partnerships are those that consciously embed themselves much more deeply into the constituencies of both institutions. The Northern San Joaquin Valley Chapter did this by opening up the Butch Welsch session to all its contractors (26 attended). Coincidentally, 26 individuals (contractors and union members) participated in roughly equal proportion in the strategic planning conference, 18 of whom also volunteered to serve on the three follow-up subcommittees.



On the union side, a number of those individuals were not union officers, instead they were members actively working as service managers, dispatchers, and project managers for the contractors interested in pursuing this business.

Of course there is a good technical reason to dig deeper into the ranks in developing and staffing labor management partnership activities—these folks are working in the field and bring current operational perspective to the table. But just as important, they also serve to build a stronger political base for the work of the partnership which may be tackling some sensitive issues impacting either the contractor or union constituencies (or both).

Role of central institutions

Central (national) bodies often encourage and support local labor management partnerships. In Stockton's case, it was the Best Practices Market Expansion Task Force that brought Welsch to their attention and the national LMCC that funded his subsequent visit.

Further, the national LMCC subsidized the strategic planning conference and national bargaining partners provided the standard form contract template, residential addendum, and code of conduct that could contribute to the work redesign effort.

Conclusion

No single formula for successful labor management partnerships exists. Each pairing must craft a solution suited to their particular history and unique environment. Nevertheless, some general guidelines that are fairly predictive of success are in evidence in the Stockton case:

1. build trust with the other side by working with them on projects at every opportunity;
2. build trust with your own constituents by engaging them in the work of the union and the chapter (including partnership activities);
3. get busy, work on stuff together, and don't worry about being overly formal, but create a concrete plan with named assignments, meeting schedules, due dates; and
4. take advantage of resources offered by your national partners. ■

Michael E. Gaffney has 30 years of experience in the field of labor-management cooperation.



THANK YOU!
PLEASE COME AGAIN

Customer loyalty is built on a foundation of understanding.

By Skip Maloney

Companies generally derive 80% of their revenue from 20% of their customers. This means that if you have 10 customers, just two of them are delivering \$800 out of every \$1,000 that comes in the door.

Those two customers are known as the “loyal” ones. They purchase your goods and services repeatedly, over an extended period of time.

Maintaining that loyalty and expanding it to embrace new customers is a critical component of any company’s growth. Identifying the nature of that loyalty requires a company to ask its customers three important questions, designed to identify key components of the customer satisfaction equation:

- What’s most important to you as a customer?
- How would you rate this company’s performance?
- Would you recommend this company to others?

To gain a greater understanding of HVAC and sheet metal customers’ requirements—and identify ways to improve the competitiveness of HVAC and sheet metal contractors—the SMACNA-sponsored New Horizons Foundation (NHF) funded a study called *Measuring Customer Loyalty – A Benchmark Study of HVAC & Sheet Metal Customers’ Satisfaction*.

“The challenges this industry is facing make it imperative to understand the ‘voice’ of the customer,” says Dennis Sowards of Quality Support Services of Phoenix, Ariz. He thinks the only way for the union sheet metal industry to gain strength is to be aware of and act upon the forces that drive customers’ buying decisions, create customer confidence, and build enduring loyalty.

Performance ratings in the survey suggest that HVAC and sheet metal customers are generally satisfied—8.2 on a scale of 1 to 10—but there is room for improvement. “I was surprised that the overall satisfaction wasn’t higher,” Sowards says. “We clearly have contractors out there with at-risk customers.”

In terms of Net Promoters—the percentage of customers who would not recommend a contractor at all—owners, general contractors, and mechanical contractors gave sheet metal scores of 91%, 89%, and 88%, respectively. However, only 67% of government and 33% of school contractors would enthusiastically recommend their sheet metal contractor. Overall, the industry tallied a respectable score of 79%.

“When I presented these findings at a SMACNA meeting, it generated some interesting discussion,” Sowards says, “amounting to excuses and defense mechanisms. Rather than get defensive, we ought to take steps to fix our problems.”

Throughout the study, customers consistently rated their contractors higher than the contractors thought they would be rated. According to Sowards, this sort of discrepancy indicates a ‘disconnect’ between what customers believe is important and what contractors *think* their customers believe is important.

Among eight ‘performance factors,’ such as Price, Meeting the Schedule, and Customer Service, customers rated contractors’ Quality of Work, Safety Performance, Business Relationship, and Flexibility higher than contractors expected; however, they rated the other factors lower than contractors expected.

What is it that contractors should do with all of this information? “Read it and understand it,” Sowards says. Even if they did not participate, Sowards recommends contractors talk to their customers about the study and ask them if there were factors missing from the survey.

“Don’t lull yourself to sleep,” Sowards recommends. “Based on the survey, contractors should understand that their non-union competition is doing better in the eyes of their customers than they think.”

He concludes, “In other words, we’re at risk. We can’t rest and pat ourselves on the back. Remember, we surveyed the top customers of these contractors, and results showed us that there’s room for improvement. You have to recognize that there’s more to be done.” ■

Maloney is a freelance writer based in North Carolina. New Horizons Foundation’s report is available in the bookstore at newhorizonsfoundation.org. It’s also possible to download a free executive summary from the bookstore.

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SMOHIT Takes Care of Today... and Tomorrow

As NEMI addresses future needs of the industry, SMOHIT is hard at work addressing safety concerns of today's workers. Like emerging markets, worker safety is experiencing a wave of increased regulatory oversight through the ongoing efforts of the Occupational Safety and Health Administration (OSHA).

While SMOHIT is more keenly focused on the here and now—providing more than 200 hours of CD, DVD, and instruction booklet training materials, the organization is no less engaged in the future of the industry.

“Our training resources allow us to extend our market share,” says Gary Batykefer, SMOHIT's administrator. “As these different industries develop, we'll see OSHA standards become a requirement for access to state and federal jobs.”

He believes that instead of getting into a mad rush to complete such training, the industry should start training now.

Further, there is a more basic dynamic at work in the field of safety training. Adequate safety training reduces the number of lost man-hours associated with on-the-job accidents and helps contractors lower their Experience Modification Rates (EMR). That means contractors save money. “It's a win-win situation,” Batykefer says.

Aside From All That

Batykefer believes that the most difficult enemy in the jungle ahead is complacency—the tendency of some contractors and union craftspersons to be satisfied with the way things are, too tightly focused on the job at hand to see the future and take steps to address its needs.

SMOHIT's mission is to develop and promote health and safety resources for the sheet metal industry in order to create a safer, injury-free workplace.

“The best weapon against this attitude is a industry partnership of management and labor,” Batykefer says. “If we raise awareness and motivate just one contractor and one craftsperson at a time, we'll eventually make some headway.”

NEMI administrator Tony Picarazzi agrees. “This is coming very fast, and we need to be aware of this now, rather than later. The jobs are already in the pipeline. Are we going to prepare now or wait until the jobs do hit the streets and it's too late?”

“Somewhere in the translation,” Batykefer concludes, “this message is getting lost on both ends. We are partners in this whole deal and if we work together as a cohesive unit, we can advance the industry and help everybody.” ■

Maloney is a freelance writer based in North Carolina.

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