



**PLUMBING-HEATING-COOLING  
CONTRACTORS ASSOCIATION**

**PLUMBING-HEATING-COOLING  
CONTRACTORS  
NATIONAL ASSOCIATION**

**ZONE DIRECTOR PLAYBOOK**

---

Plumbing-Heating-Cooling Contractors – National Association  
180 S. Washington Street  
Falls Church, VA 22046  
Phone: (703) 237-8100 / (800) 533-7694  
Fax: (703) 237-7442  
E-mail: [naphcc@naphcc.org](mailto:naphcc@naphcc.org) Website: [www.phccweb.org](http://www.phccweb.org)

# Zone Director Playbook

## Table of Contents

Table of Contents	Page #
Introduction .....	2
Overview of PHCC National Association .....	2
Mission Statement .....	2
Vision .....	2
Core Values .....	3
Duties and Responsibilities of PHCC Zone Director.....	3
2019-2020 Zone Director Map .....	7
PHCC’s Five-Year Goals and Objectives (2016-2021).....	8
Membership.....	8
Public Awareness .....	8
Additional Sources of Non-Dues Revenue.....	8
Workforce.....	8
HVAC.....	9
Products and Services.....	10
PHCC Member Discounts .....	11
Communities.....	12
Enhanced Service Groups.....	12
Business Interest Groups .....	12
HVAC Business Interest Group.....	12
Plumbing Business Interest Group .....	12
Technology Business Interest Group.....	12
Apprentice & Student Community .....	12
PHCC – National Auxiliary .....	12
PHCC Legislative & Regulatory Tracking Center .....	13
Member-Only Publications.....	13
Education and Apprenticeship.....	14
PHCC Academy HVAC & Plumbing Pre-Apprenticeship Course.....	15
Apprenticeship and Technician Training.....	15
Plumbing Assessment Tests .....	15
Scholarship Program.....	15
CONNECT 2020 .....	15
Enhanced Service Group Training and Professional Development.....	16
Membership Recruitment and Retention .....	17
Member-Contractor Profile: .....	17
Types of Work.....	17
Fields of Work.....	17
Company Gross Revenue .....	18
Number of Employees .....	18
Multi-touch cadence .....	19
3 Pillars of Retention .....	19
Onboarding.....	19
Potential Communication Touch Points with Chapter Outreach .....	19
Mentoring .....	20
Messaging.....	20
Key performance indicators (KPIs).....	21
Resources.....	21
Connect with Chapters.....	21
Membership Department Staff.....	22
Membership Classes .....	22
Installation Ceremonies .....	23
Forms.....	32

## **Introduction**

You have been elected to serve in a position of leadership in the oldest trade association in the construction industry, the Plumbing-Heating-Cooling Contractors—National Association (PHCC--National Association). Congratulations!

This Playbook has been prepared to orient you to your duties and responsibilities as one of the leaders of the national association and to provide strategies and resources for executing your duties. By accepting your position, you have made a commitment to devote a portion of your time and talent to carry out the duties and responsibilities of your office. You must now "think" on a national level and let your actions be governed by what is best for PHCC--National Association. To assist you in making this adjustment, you will find this Playbook a valuable tool.

You can serve this great industry of which we are a part. PHCC will be stronger and better under your leadership, dedicated efforts, and devotion to your duties. Thank you for your dedicated leadership and service!

## **Overview of PHCC National Association**

As the premiere organization for the p-h-c professional, PHCC provides legislative advocacy, education and training to more than 3,000 plumbing and HVACR open shop, dual shop and union businesses and 65,000 technicians. Our members work in the residential, commercial, new construction, industrial and service and repair segments of the construction industry. Members of PHCC have access to a wide variety of resources and services, strengthening their reputation as the best choice for professionalism, reliable products and knowledgeable service—and as a proud protector of public health and safety and the environment. Approximately 125 [state and local association affiliates](#) are part of PHCC's chapter network.

## **Mission Statement**

The Plumbing-Heating-Cooling Contractors Association is dedicated to the advancement and education of the plumbing and HVACR industry for the health, safety and comfort of society and the protection of the environment.

## **Vision**

PHCC will become so relevant that PHCC contractors are the best choice for professionalism, reliable products and knowledgeable service.

## Core Values

- Leadership and Innovation
- Professionalism and Integrity
- Member Focused
- Technical and Business Expertise
- Career Development and Education
- Quality Installation and Service
- Proactive Advocacy
- Collaboration

## Duties and Responsibilities of PHCC Zone Director

The responsibility of the Board of Directors is to preserve, protect, maintain and enhance the PHCC National Association. Directors oversee PHCC National's operations and make sure that its staff and volunteers act legally and ethically using the following principles:

- Duty of Care- A board member must be active in organizational planning and decision making. Board members must exercise reasonable care when he or she makes a decision for the organization. Reasonable care is what an "ordinarily prudent" person in a similar situation would do.
- Duty of Loyalty- A board member must never use information gained through his/her position for personal gain and must always act in the best interests of the organization. Board members must avoid conflicts of interest or the appearance of conflicts.
- Duty of Obedience- A board member must be faithful to the nonprofit organization's mission. He or she cannot act in a way that is inconsistent with the organization's goals. The public trusts the board to manage donated funds to fulfill the organization's mission.
- The Board of Directors sets policy and provides direction and the Association staff implement those policies and direction.
- The Board of Directors should be intimately familiar with PHCC Bylaws, Polices and strategic plan.

While a Zone Director may be active in a local and/or state association, he/she must remember that the first responsibility is to the National Association. Within the zone, a director represents the National Association and its contractor members. The Zone Director is responsible for the interpretation of PHCC-National Association's policy to the membership within the assigned zone area, the activation of national programs and membership promotion. The director also plays a vital role in the formulation of Association policy and must see that the state and local associations in the assigned zone area are kept well informed of national activities.

Zone Directors should:

- Attend all PHCC-National Association Board of Directors meetings. Zone Directors are expected to present reports about chapters in their zone during Board of Directors meetings, including updates in key strategic areas.

- Be in personal contact with each president and chief staff person in his/her zone on a regular basis to offer assistance. The PHCC Chapter Relations Manager is available to assist with setting up regular zone conference calls as needed. Be alert to suggestions, recommendations, problems and successes and include activities in your board reports. If the director becomes aware of an issue that needs to be included on the Board of Directors agenda, the director should contact the Executive Vice President.
- Attend state conventions for states represented in the assigned zone area and submit a Convention/Meeting Report to the Association immediately following the event. Zone Directors should be invited and encouraged to speak to the chapter membership at least once on national activities. Association staff will provide talking points for this purpose. Zone Directors may also be asked to preside over the installation of officers. Sample Installation Ceremony scripts are included in this Playbook for your reference and use.
- Assist state presidents so that a national officer and companion attending state conventions are properly welcomed and introduced. It is PHCC Policy that a national officer attends a state convention every other year, if invited.
- Follow up on prospective members in their zone.
- Develop one area in their zone to start a new affiliate association.
- Encourage and promote maximum attendance at the PHCC CONNECT annual conference and tradeshow from their zone.

Included below for your quick reference are the PHCC policies that pertain to Zone Directors:

1.2.1. Annual Business Meeting. Affiliate's association executives should work with their presidents and their zone director in order to present matters before the Annual Business Meeting.

2.1.4 Communication Between Officers, Zone Directors and Staff. All relationships and communications between the officers, zone directors and the staff are to be conducted on a strictly professional basis. Zone directors will be promptly informed of any activities and communications that affect the states they represent.

2.1.5 Zone Directors' Responsibilities. The responsibilities of Zone Directors include the following:

- 2.1.5.1 Attend all meetings of the PHCC Board of Directors.
- 2.1.5.2 Attend state conventions of the states they represent unless deemed not to be prudent by mutual agreement of the PHCC President, Zone Director and the state association affected, and submit a report (format provided in the Board handbook).
- 2.1.5.3 Contact the president and/or executive of each state in their zone on a monthly basis and report in writing findings to the PHCC President and Executive Vice President.
- 2.1.5.4 Follow up on member prospects in their zone.
- 2.1.5.5 Develop one area in their zone to start a new affiliate association.

2.1.5.6 The Zone Director will assist the state in seeing that the national officer and companion is introduced and escorted to the various functions at affiliate convention meetings.

2.1.5.7 For reimbursement of expenses see Policy 4.7. (format provided in the Board handbook).

2.1.5.8 Board members are encouraged to attend both the Leadership Conference and the Legislative Conference.

2.1.5.9 The senior Zone Director in each zone shall be the coordinator of all activities within that zone.

2.4.4 Copies of Correspondence. Zone Directors will receive copies of all correspondence between the National office and associations in the states for which they are responsible.

2.4.5 Recruiting New Members. In order to facilitate the recruitment of new members, it is imperative that an accurate listing of all state and local association dues amounts be maintained at the national office. National zone directors are responsible for providing dues information for the database, with the support and help of state and local executives and national staff. (Approved 10.02.12)

2.4.7 State Convention Policy. This policy has been developed to explain the process by which affiliated state associations may invite PHCC Officers, Zone Directors, Committee Chairmen and/or National staff to attend state conventions.

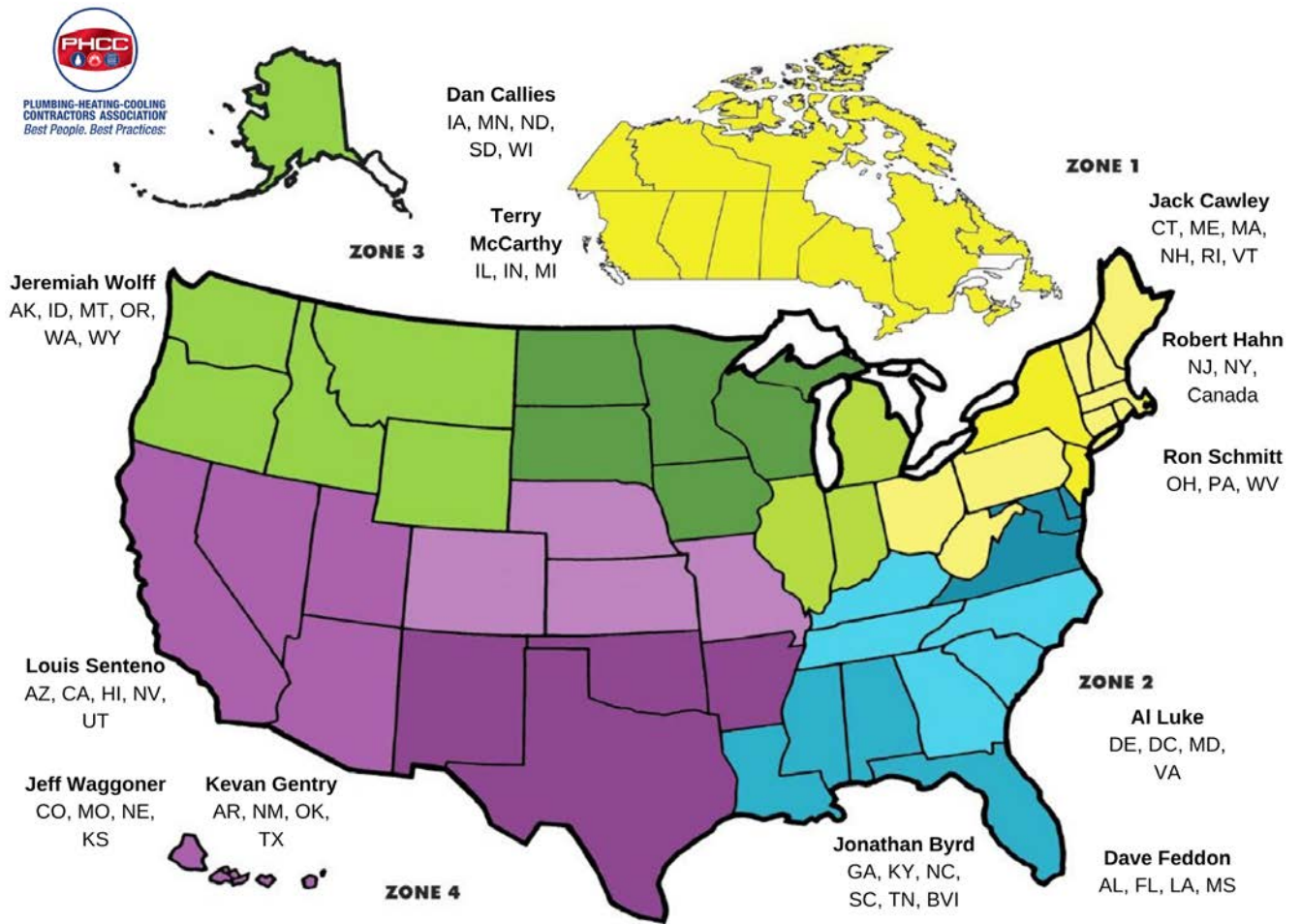
- If a state wishes national representation at a state convention, their request should be sent to the attention of the Executive Vice President in accordance with Policy 2.4.3. Every other year, affiliated state associations are entitled to request that a PHCC officer be assigned to attend their state convention. The PHCC President will assign officers based upon their availability. When the assignment has been made, the national office will inform the state association executive manager which officer has been assigned to attend the state convention. If, for any reason, the state association does not want a national officer to attend or cannot meet the conditions set forth herein, an invitation does not have to be extended.
- PHCC representatives (excluding staff) will be invited at the expense of the state extending the invitation. Any state that is unable to pay the expense for a national representative may appeal to the President for the expense to be paid by PHCC. Staff invited to attend a state convention (excluding the Executive Vice President who shall be treated as an officer) shall not be required to pay hotel room or convention registration expenses.
- PHCC will pay travel and other incidentals for the officer and spouse/companion while attending a state convention. PHCC shall expect the state association to provide complimentary convention registration, hotel accommodations, and to allocate the officer twenty (20) minutes time on the convention program (preferably the business session) to make a report on the activities of the PHCC.

- Each zone director will be provided complimentary convention registration for each state the director represents.

Policy 2.4.6 Dues Investment Billing Cycle for National/State/Local

- February 15- A list of “delinquent members” who have not renewed will be sent to each state and to the respective zone director. Zone directors will contact states in their subzones to discuss the status of the members’ dues. A “past due” postcard will be mailed to delinquent members.
- March 31- Delinquent members are dropped from the national membership roster and a dropped member report will be mailed to state offices with a copy and to the respective PHCC zone director.
- August 2- A list of “delinquent members” who have not renewed will be sent to each state and the respective PHCC zone director. Zone Directors will contact the states in their sub zone to discuss the status of the members’ dues. A “past due” postcard will be mailed to delinquent members.
- August 15- Delinquent members are dropped from the national membership roster and a dropped member report will be mailed to state offices with a copy to the respective PHCC zone director. Delinquent rosters will be sent to states and PHCC zone directors one month prior to the end of the grade period.

# 2019-2020 Zone Director Map



## PHCC's Five-Year Goals and Objectives (2016-2021)

Goals represent outcome-oriented statements intended to guide and measure the organization's future success. The achievement of each goal will move the organization towards the realization of its "Envisioned Future." Supporting objectives further clarify direction and describe what the organization wants to have happen. In other words, a descriptive statement of what constitutes success in measurable terms.

Priority Key:

(I) = Immediate –Must begin objective in next fiscal year

(M) = Mid-Term – Should be undertaken in the next fiscal year if possible

(L) = Later – Can wait until a subsequent fiscal year if necessary

### Membership

**Goal:** Joining and maintaining PHCC membership are viewed as essential to contractor success.

Objectives:

1. Maintain a minimum of 90% retention rate. (I)
2. 20% net growth per year in contractor membership. (I)
3. Expand PHCC's geographic reach. (M)

### Public Awareness

**Goal:** PHCC members are recognized as contractors of choice.

Objectives:

1. Formulate a strategy to identify potential targets for outreach and prioritize based on greatest impact for investment. (I)
2. Enhance effectiveness of communication tools, e.g., social media, etc. (L)
3. Increase members' ability to market themselves with PHCC tools. (L)

### Additional Sources of Non-Dues Revenue

**Goal:** Reduce PHCC financial dependency on dues to 33% of revenue (This means to raise gross revenue by \$1.5 million or \$300,000 per year).

Objectives:

1. Increase access for Corporate Sponsors And develop and promote non-corporate sponsor program to allow for smaller contributions. (I)
2. (I)
3. Develop standards and certifications/ designations/ certificates to be adopted by the PHCC industry. (L)
4. Develop partner programs for non-traditional partners (Amazon) (M)

### Workforce

**Goal:** Reduce workforce shortages within the industry through PHCC's leadership and education efforts.

Objectives:

1. Increase the number and effectiveness of PHCC workforce recruitment resources. (I)
2. Increase the utilization of workforce recruitment resources. (M)
3. Increase PHCC's role in raising awareness of job opportunities. (I)
4. Facilitate getting curriculum into high schools (M)

## HVAC

**Goal:** PHCC is more highly regarded as a valuable and equally recognized resource for HVAC professionals as it is within the plumbing industry.

(Expansion into the HVAC trade will help increase membership, sponsorship, education, collaboration, awareness, workforce development, etc.)

### Objectives:

1. Increase collaboration with ACCA or other associations that are predominately heating and cooling associations (will raise membership, educational tools and sponsorships) (I)
2. Expand HVAC sponsors/products and education at CONNECT. (I)
3. Increase support to plumbing contractors to expand into HVAC. (M)
4. Expand opportunities to unify plumbing and HVAC industries (L)

## Products and Services



# MEMBER BENEFITS

Plumbing-Heating-Cooling Contractors — National Association

### Everything You Need to Strengthen Your Business — Now and in the Future

As a member of the PHCC community, you plug into a powerful network of valuable resources and contractors at the local, state and national level — plus our own PHCC Educational Foundation — offering the knowledge, tools, programs and services you need to succeed. PHCC means business, from protecting your interests with lawmakers and preventing over-regulation to providing huge savings when you take advantage of member discounts on products and services.

- **BEST PRACTICES**
  - Marketing & Advertising Resources
  - Find a Contractor Online Directory
  - Personalized Online Member Dashboard
  - Access to Subject Matter Experts
  - Safety & Risk Management Tools
  - PHCC Water Supply Calculator App
- **EXPERT & AFFORDABLE TRAINING**
  - Project Management & Foreman Training
  - Plumbing & Mechanical Codes Training
  - PHCC Academy Programs
  - Webinars & Other Training Opportunities
- **SAVINGS & DISCOUNTS**
  - PHCC Industry Partners
  - PHCC Labor Unit Database Subscription
  - Online Buyers' Guide
  - Discounts on Programs & Services
  - Member Discounts on Conferences
- **NETWORKING OPPORTUNITIES**
  - Access to Online Communities
  - Join PHCC Enhanced Services Groups
  - Online Business Interest Groups
  - CONNECT Conference & Tradeshow
  - Online & Print Member Directory
  - State & Local Chapter Events and Online Resources
- **WORKFORCE DEVELOPMENT**
  - Plumbing & HVACR Apprentice & Journeyman Training
  - Pre-Apprentice Courses
  - Workforce Development Center and Resources
  - Scholarships
  - Assessment Tests
  - Career & Job Fair Materials
  - PHCC Career Center & Job Board
- **ADVOCACY**
  - Legislative & Regulatory Participation
  - Representation on All Code Body & Industry Coalitions
  - State Legislative & Regulatory Tracking Tool
  - Fight Against Over-Regulation
  - Reinforcement of Industry Standards that Protect Public Health & Safety
  - Regular Alerts on Laws, Regulations & Code Changes
  - Annual Legislative Conference in Washington, D.C.
  - Grassroots Network to Engage Members When Needed to Take Action

### WE MEAN BUSINESS

180 S. Washington Street, Suite 100  
Falls Church, VA 22046  
Phone: 703-237-8100 | 800-533-7694  
Fax: 703-237-7442  
Email: [membership@naphcc.org](mailto:membership@naphcc.org)  
[phccweb.org](http://phccweb.org)

## JOIN PHCC TODAY!

## **PHCC Member Discounts**

We've partnered with companies across various industries to provide our members with substantial services and discounts. Questions or concerns? Contact [customercare@naphcc.org](mailto:customercare@naphcc.org).

### **ARAMARK**

Outfit your employees for comfort and style while you build your business with custom-embroidered clothing. Build relationships with your customers by displaying employee names and your company logo on work apparel. Add the PHCC logo to give your customers the confidence and security of using a contractor they can depend on. To place an order, call (800) 677-6060, or go to [www.aramark-uniform.com/phccmember](http://www.aramark-uniform.com/phccmember).

### **ExxonMobil**

PHCC offers a partnership with ExxonMobil to provide fuel savings and fuel management tools to members. We offer an option for members who may need to enjoy a broad network acceptance benefit. With ExxonMobil's Fleet National card, fuel up at over 95% of U.S. fueling stations. Approved members can save up to 8 cents/gallon for 12 months with fuel rebates at ExxonMobil by using the PHCC ExxonMobil fuel card. After the promotional period, members can still save up to 5 cents/gallon. In addition to rebates, the ExxonMobil fuel card also provides access to powerful online tools and mobile apps to manage spending, help reduce fraud, and save time on reporting. For more information, contact Oyik Mora, by email at [oyik.mora@wexinc.com](mailto:oyik.mora@wexinc.com) or by phone at (980) 254-6333.

### **Greensky**

Helping its members close more sales and grow their businesses, PHCC has partnered with the GreenSky® Loan Program, a leader in home improvement financing. GreenSky gives PHCC members the opportunity to offer their customers flexible financing plans, such as no down payment/no interest promotions, as well as deferred interest, low interest and fixed payment options. \*

\* *Subject to credit approval. Ask for details.*

### **Hudson, Ink**

You deserve contractor marketing that works. That's why we help contractors do three things: Get more customers, raise your image, and keep customers buying and referring. Through member-only access, in-home service contractors get automated multi-channel campaigns, plus one-on-one coaching and custom marketing strategies. Simple methods, blistering results, quick implementation. All guaranteed. All done for you. Call 800-489-9099, email [coaches@hudsonink.com](mailto:coaches@hudsonink.com), or visit [www.hudsonink.com](http://www.hudsonink.com).

### **Market Hardware, Inc**

Market Hardware is the preferred website and internet marketing provider for PHCC. As a member, you have access to discounted website packages, SEO services and more. To take advantage of special member discounts and offers, visit [PHCC.markethardware.com](http://PHCC.markethardware.com) to schedule a free consultation or contact Market Hardware directly at (888) 262-8761 or [phcc@markethardware.com](mailto:phcc@markethardware.com).

## **Time Communications**

Don't miss your customers' calls! Time Communications answers your phones when you can't ... and treats your customers just like you would. Services include 24/7/365 call answering, paging and dispatch services, emergency response, appointment scheduling, on-call scheduling, and dedicated operators. Time Communications will develop a call management plan that works for your business – and deliver its award-winning customer service to your customers – all at a discounted monthly rate.

## **Communities**

### **Enhanced Service Groups**

PHCC members can enhance the value of their PHCC membership by joining one (or more!) of our Enhanced Service Groups that provide an additional layer of specialized, interest-based benefits.

- Association Executives Council (AEC)
- Construction Contractors' Alliance (CCA)
- Quality Service Contractors (QSC)
- Union-Affiliated Contractors (UAC)

### **Business Interest Groups**

PHCC's online Business Interest Groups are a collection of interest-based communities full of interest-based information, resources and discussion opportunities to help contractors expand their knowledge and contact base. Access is limited to members only.

[HVAC Business Interest Group](#)

[Plumbing Business Interest Group](#)

[Technology Business Interest Group](#)

### **Apprentice & Student Community**

For industry apprentices and students, the online [PHCC Apprentice & Student Community](#) is a one-stop shop for what's next in their career. Members of the group can tap into a network of other apprentices and students to share lessons learned and proven effective solutions. Instructors and other professionals in the plumbing and HVACR community are available for information and guidance.

### **PHCC – National Auxiliary**

The Plumbing-Heating-Cooling Contractors – [National Auxiliary](#) consists of men and women unified by the purpose of working in partnership with the plumbing, heating and cooling industry through cooperation, communication and education.

## PHCC Legislative & Regulatory Tracking Center

The PHCC Legislative & Regulatory Tracking Center allows PHCC members and chapter leaders to track and monitor active bills and regulations.

Click on your region in the US below for a quick glimpse of the bills and regulations (such as licensing, workforce development, small business and more) that impact you, your business, and your family.

### *Member-Only Publications*

PHCC Solutions, PHCC's digital and print magazine, focuses on the topics and issues of importance to contractors and other key audiences in the plumbing, heating and cooling industry. Published every quarter, *Solutions* offers readers an inside look into our industry, educational tools and resources and the latest business management resources.



PHCC Online, PHCC's digital monthly association newsletter.

This is a screenshot of the PHCC Online newsletter page. At the top, there's the PHCC logo and the text 'ONLINE Your Source for Association and Industry News'. Below that, there's a red banner with social media icons and the date 'March 2019'. The main image is a group photo of people in front of the US Capitol building. Below the photo, there's a section titled 'We Need You! Tell YOUR Story at the PHCC Legislative Conference, May 7-8'. The text describes the importance of the conference and encourages members to participate. There's also a section for 'Corporate Partners' with logos for various companies like American States, Harsco, and others. At the bottom, there's a banner for 'CONNECT 2019' with the text 'Ready, Set, CONNECT! CONNECT 2019 October 2-4 The World's Most Technological • Indianapolis, IN'.

# PHCC Advocate, PHCC's digital monthly legislative and regulatory newsletter



March 2019

## Registration Now Open

PHCC's 2019 Legislative Conference  
May 7-8, 2019  
Hyatt Regency Capitol Hill

### Legislative Report

#### Congressman Suozzi Takes a Regionalized Approach to the Workforce Crisis

By Mark Izzo, Vice President of Legislative Affairs

Congressman Tom Suozzi (D-NY), along with other leaders from the business community, labor, local community colleges and workforce development boards, announced the formation of the Long Island Apprenticeship & Workforce Development Task Force. Congressman Suozzi is committed to the skilled trades and has taken a regionalized approach as the solution to a national crisis. "I convinced this task force in the hopes that we can provide coordinated coordination to create a streamlined process that is more effective for employers looking to fill open positions, and for job seekers that are interested in these opportunities," said Congressman Suozzi. "We must also work to promote these important job-training programs so that potential employees are aware of the current resources available to them. Additionally, we must enlighten young people here on Long Island, so they know that there are other ways to make it in America besides going to college. The key to our future lies in building a better skilled workforce for the benefit of our business and middle-class communities here on Long Island." PHCC National – in conjunction with PHCC of Long Island – will be speaking with Congressman Suozzi this Friday to offer assistance and participate in his initiative.

#### Senator Cruz Introduces Tax Credit Bill Regarding the Skilled Trades

By Mark Izzo, Vice President of Legislative Affairs

Senator Ted Cruz (R-TX) introduced the **Education Freedom Scholarships and Opportunity Act**, a bill that creates a new dollar for dollar, non-refundable tax credit for contributions from individuals and businesses to state-identified nonprofits, called Scholarship Granting Organizations (SGOs) and Workforce Training Organizations (WTOs). SGOs and WTOs distribute these donations as scholarships, expanding students' access to a variety of educational opportunities, which may include advanced, remedial and elective courses, private and home education, apprenticeships, industry certifications, concurrent and dual enrollment, tutoring, community colleges, summer and afterschool education programs, transportation, and more.

### Regulatory Report

#### PHCC Meets with DOL on Apprenticeship

By Chuck White, Vice President of Regulatory Affairs

PHCC continues to focus on advocating for positive workforce development regulations that will help our industry. PHCC Regulatory Affairs Sub-Committee Chairman Steve Schaefer led a task group of members and staff in a meeting with U.S. Department of Labor officials to offer insights from our years of experience with apprentice training. DOL is revising its guidance for apprentice programs to provide a streamlined, nationally consistent approach to training and PHCC is committed to providing practical assistance to the process. PHCC National, along with Texas, PHCC and PHCC of Iowa, engaged in detailed discussions to advocate for innovative ways for members, particularly smaller contractors, to expand their workforce through appropriate apprentice ratios.

#### DOE Issues Final Process Rule

By Chuck White, Vice President of Regulatory Affairs

PHCC's new Regulatory Affairs Sub-Committee is actively providing comments to numerous U.S. Department of Energy (DOE) proposed rulemakings. PHCC previously filed comments that had a favorable impact in support of a revised Process Rule, a rule that requires DOE to follow specific procedures in a publicly transparent manner. The final version of the Process Rule drives DOE to work in a more balanced environment and allows the contractor's practical voice to be heard. PHCC plans to attend a public meeting to be held March 21 in Washington, D.C. to engage in final discussions on this rulemaking. Details of the DOE rulemaking may be found in the [Federal Register Notice](#).

#### DOE Evaluating Rules on Gas Furnaces and Commercial Boilers

By Chuck White, Vice President of Regulatory Affairs

PHCC is supporting a gas industry petition to the U.S. Department of Energy regarding residential gas furnaces and commercial boilers. Previous DOE rulemakings would have made these products, with a very few exceptions, condensing type products. The petitioners maintain that non-condensing type equipment provides specific functionality in that these products allow the use of natural venting systems, a distinction which is critical in many applications. PHCC has long held a position that there is a need for conventional, non-condensing products in the marketplace and that many installations would face significant installation costs when replacing existing vent systems. PHCC will file comments that reinforce this position and ask DOE to rescind these rules and reconvene the rulemaking process. More information on the gas industry petition may be read [here](#).

#### DOL Overtime Rule Revisions Expected

By Chuck White, Vice President of Regulatory Affairs

The U.S. Department of Labor (DOL) has committed to releasing a revised overtime rulemaking this month after re-evaluating several provisions of their previous rule. Previously, PHCC provided comments to the DOL on its reworking of the Overtime Rule. The department has been working to revise its last proposed rule to make the provisions less onerous to small business. It is expected that the payroll threshold, which was proposed to be over \$43,000, will be revised down to a more moderate level in the range of \$35,000. PHCC will be following the proposals in the coming months and will be providing additional feedback through our Regulatory Affairs Sub-Committee and Government Relations Committee.

#### PHCC Monitoring Refrigerant Activities

By Chuck White, Vice President of Regulatory Affairs

As a member of the HVACR Alliance, PHCC has been working with this group of HVACR industry partners to monitor developing activities in the refrigerant world. As a result of legal rulings on federal HFC regulations, several states are pursuing developing their own phaseout plans. States include California, Connecticut, Maryland, New Jersey, New York, North Carolina, Vermont and Washington. Of these states, a few states have made progress on this and seems to be following EPA's SNAP Rule 20 and Rule 21. During discussions of these developments, the HVACR Alliance maintained its position that refrigerant regulation should be maintained at the federal level. Without the federal guidance, the coalition believes that the states that are pursuing independent rulemakings should be encouraged to act in a harmonized manner to prevent a patchwork regulatory landscape from emerging on the horizon.

#### IRS Clarifies HVAC Equipment Expensing

By Chuck White, Vice President of Regulatory Affairs

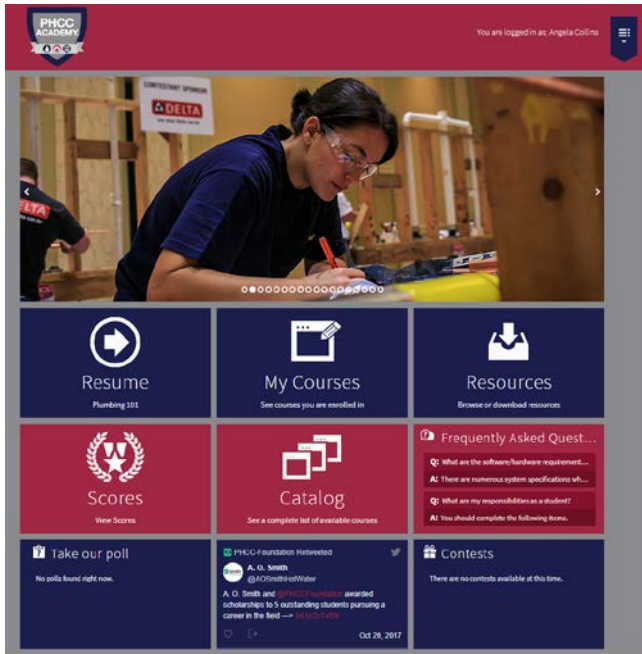
The IRS has issued a **Guidance Document** to clarify the status of HVAC equipment. As a result of last year's tax reform, some questions arose as to the Section 179 expensing of commercial business HVAC equipment. This guidance specifically identifies heating, ventilating, and air conditioning property that are in, on, or adjacent to non-residential property. As always, clients should consult with their tax advisors to be sure that they are in compliance with the regulations.

#### CORPORATE PARTNERS



## *Education and Apprenticeship*

### **PHCC Academy HVAC & Plumbing Pre-Apprenticeship Course**



This new online educational program gives prospective HVAC and plumbing apprentices an opportunity to learn about the p-h-c trade before beginning a longer-term apprentice program.

### **Apprenticeship and Technician Training**

Most individuals starting out in the p-h-c field begin as an apprentice, where they are often paid as they learn the trade. The PHCC Educational Foundation's apprentice and journeyman training programs are designed to help develop a highly skilled, well-educated workforce for the improvement of the industry.

### **Plumbing Assessment Tests**

The Foundation's Plumbing Assessment Tests, available through NOCTI, help determine apprentice's understanding of the concepts and practices taught in our apprenticeship curriculum. They can also be used by business owners as a pre-employment evaluation for job candidates.

### **Scholarship Program**

The PHCC Educational Foundation and its industry partners are teaming up to provide financial assistance to students pursuing a career in the p-h-c industry.

Contractors, be sure to have your apprentices apply! Even if your company pays for apprenticeship training, a scholarship win will help offset your training costs and build a sense of accomplishment for the apprentice.

### **CONNECT 2020**

Expand your vision for success! PHCC National's Annual Conference, PHCCCONNECT2020, to be held September 30-October 2, 2020 in Dallas

**PHCC CONNECT 2020**  
 Sept. 30–Oct. 2  
 Sheraton Dallas Hotel • Dallas Texas

**PHCC** PLUMBING-HEATING-COOLING CONTRACTORS ASSOCIATION  
 Best People. Best Practices.

**Expand Your Vision for Success**

**REGISTER TODAY!**

## Enhanced Service Group Training and Professional Development

**Construction Contractors' Alliance**

Welcome to Construction Contractors' Alliance (CCA)!

The Construction Contractors' Alliance (CCA), an enhanced service group of the Plumbing-Heating-Cooling Contractors National Association, provides contractors with a team to find solutions to the many issues new construction contractors face. CCA serves PHCC plumbing and mechanical contractors specializing in residential, commercial, institutional and multi-family new construction.

**Association Executives Council**

Welcome to AEC!

The Association Executives Council of PHCC is an "association within an association." Its members are the paid staff of local, state and regional PHCC-National Association.

**Union-Affiliated Contractors**

Welcome to UAC!

The Union-Affiliated Contractors (UAC), an enhanced service group of the Plumbing-Heating-Cooling Contractors National Association, represents a unified voice for the regulatory contractors within PHCC to make sure special needs and concerns are presented.

**Quality Service Contractors**

**THE POWER OF Q**

A professional network exclusively for members of the Plumbing-Heating-Cooling Contractors Association. QSC helps you achieve greater success through services designed to help you work smarter, not harder.

**Power your business with QSC**

We combine the best industry education with personalized business coaching, online resources and non-stop support from a valuable community of p-h-c experts to help you run at your competitive best.

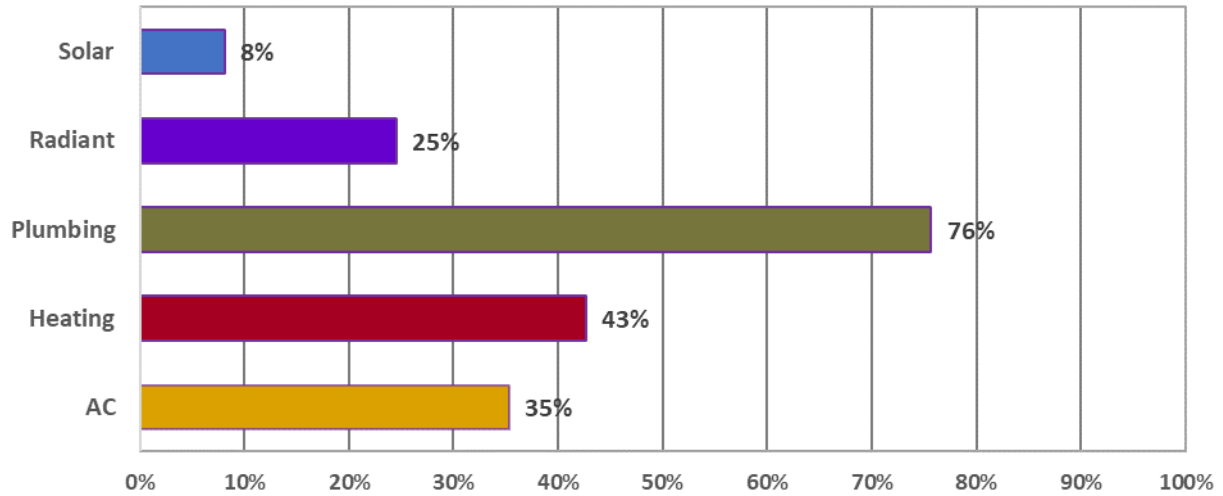
[JOIN QSC](#) [LOGIN](#)

# Membership Recruitment and Retention

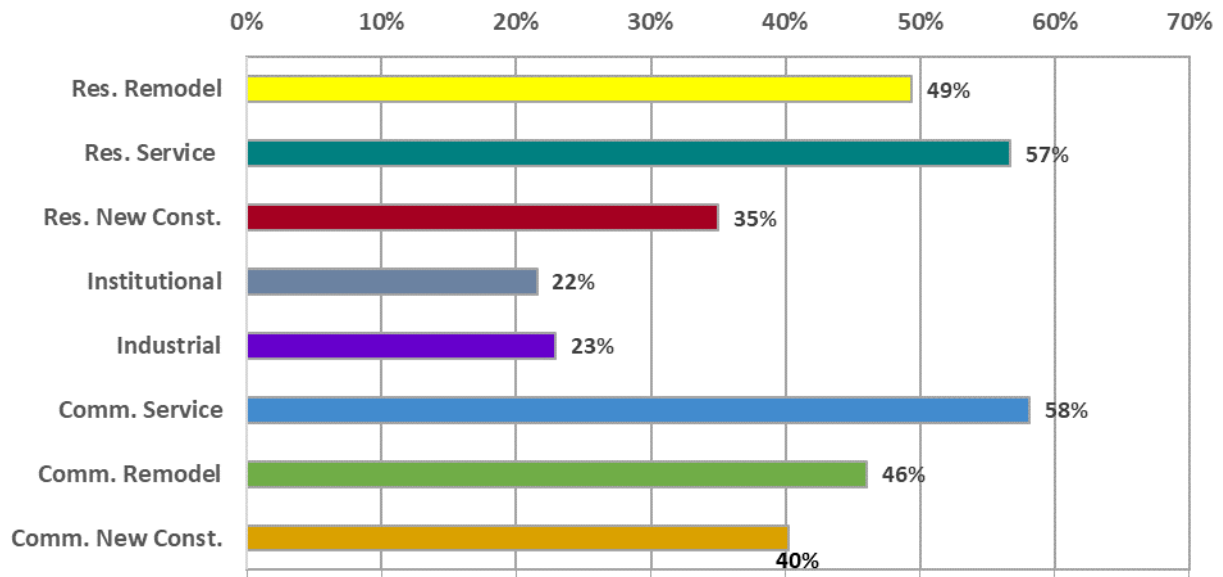
## Member-Contractor Profile:

### Types of Work

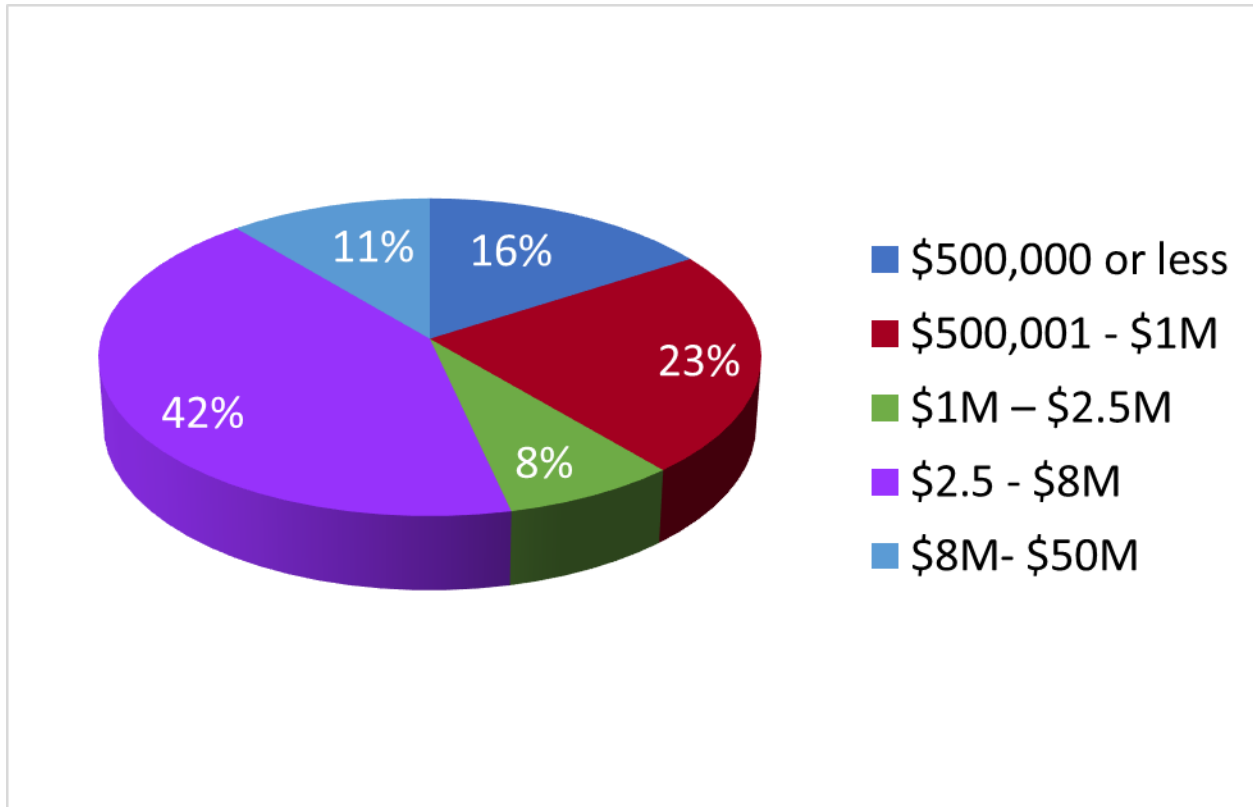
#### Total



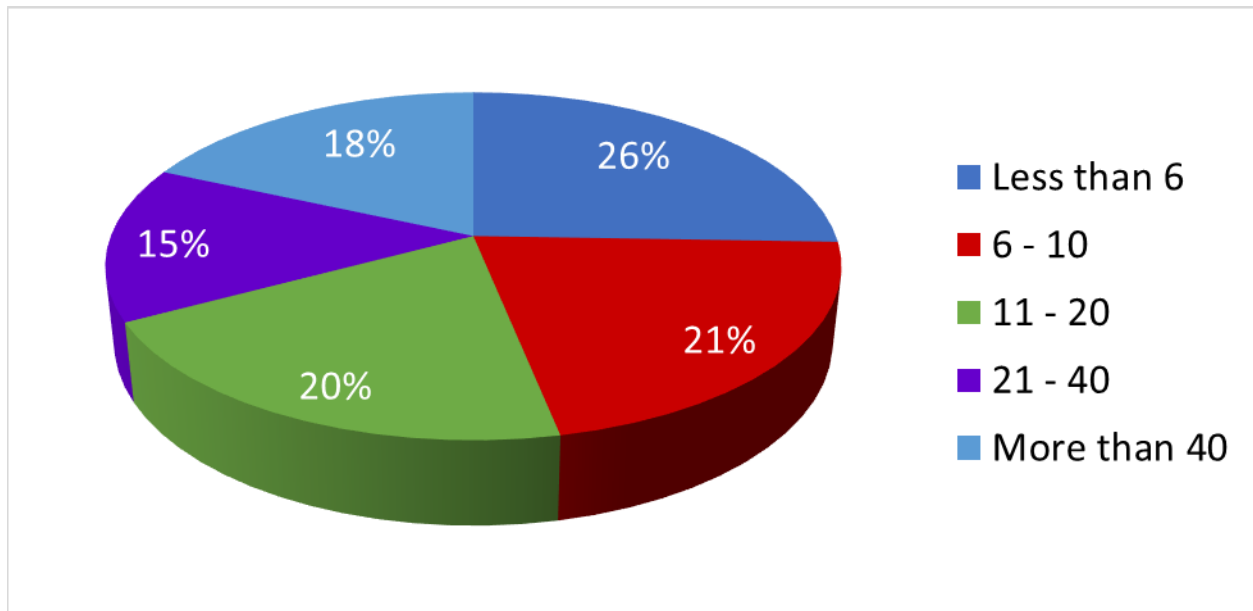
### Fields of Work



## Company Gross Revenue



## Number of Employees



## Multi-touch cadence

### 3 Pillars of Retention

- Onboarding
- Communication Touch Points
- Mentoring

Mahatma Gandhi remarked that “Your beliefs become your thoughts, your thoughts become your words, your words become your actions, your actions become your habits, your habits become your values, your values become your destiny.”

### Onboarding

There are 3 things that should happen within a new member’s first week of joining and should be coordinated with the local and or state chapter:

- The VIP call. A personal welcome call makes all the difference. It can be brief, even just a voicemail. The call should come from a leader in the association and should include an invitation to the next event (or an orientation.)
- Welcome packet. Your new member welcome packet should be in the mail. Speed is key. Your new member just put down hundreds of dollars. They made a commitment to you, now it’s your turn to make them glad they did!
- Invite them. The new member should be invited in three different ways to attend the next “orientation” session. Call, e-mail, and send a paper invite (in the welcome packet.) You may consider renaming the orientation to something more interesting like, “Meet the Leadership.” Getting that session on their radar immediately will more likely secure their participation. (And getting them involved early will more likely secure their renewal!)
- The first few months are crucial: you should aim to get the new member involved in at least one activity.

Source: National Association of Home Builders Retention Guide

### Potential Communication Touch Points with Chapter Outreach

Time after applying Application review	Communication Thank the applicant for applying and inform them of when they can expect to be approved.
Immediately after application accepted	Welcome call and thank for joining.
15 days	Follow up with personal note and information about upcoming events. Invite them!
30 days	Call and invite to upcoming events.
60 days	E-mail and call about upcoming events.
3 months	Call about upcoming events.
4 months	Call and ask what the association could help with.
5 months	E-mail about upcoming events.

6 months	Send a letter about events, benefits and ask for feedback.
7 months	Call about upcoming events and feedback.
8 months	Call and e-mail about upcoming events.
9 months	Call and e-mail about upcoming events.
10 months	Begin renewal notice process.

## **Mentoring**

Everyone who joins an organization is looking for a community of like-minded people. And within that community, each person wants to feel noticed, wanted, needed, and appreciated.

## **Messaging**

A Different View of Membership Recruitment- Membership recruitment and retention continue to be major focus areas for PHCC; however, the three-tier federation structure of our association is not growing sufficiently to replenish members who’ve left, in addition to recruiting new members. While we continue to lean on member benefits and discounts offered at each level of the federation to prove value in joining, the fact is that if members do not take advantage of all those discounts and services, then the value will never fully be felt. You can check out those benefits [here](#), but in the meantime- so what is another reason to join PHCC?

The larger, more altruistic reason to join PHCC is much deeper in meaning and a growing practical necessity for contractors. We are seeing increased attacks on our industry that require a much larger and more powerful organization to fend off challenges as witnessed in Texas with the near removal the state’s plumbing license, which could spark a trend into other regions of the U.S. Other critical challenges include workforce development, apprentice ratios, unfair utility competition, an aging infrastructure, growing number of legionella outbreaks, and other difficulties in which there needs to be a unified a call to action: a “movement” to protect our industry and the safety of our customers and the environment.

The PHCC federation represents (as described back in 1883) a membership of “allied contractors” engaged in a “movement” dedicated to the “advancement and education of the plumbing and HVACR industry for the health, safety, and comfort of society and the protection of the environment.”<sup>1</sup> This movement requires constant engagement at the local, state, and national level to ensure that members mobilize in lockstep when our industry is being attacked in ways like, for example, faulty and wasteful legislative or regulatory requirements.

In a recent survey, PHCC members ranked “legislative and regulatory leadership/representation” as a critical driver of membership in the association. As one member said in an interview: “If we have a problem and we want to see laws changed, we have a say and that’s awesome.” Comments like this indicate PHCC is providing exactly the type of representation that the PHCC founders envisioned so many years ago, but there is so much more to do- and there is power in numbers! I think of not joining a trade association as akin to what Justice Ruth Bader Ginsburg once described as “like throwing away your umbrella in a rainstorm because you are not getting wet”.

We need a movement toward a common purpose that asks if you believe that:

- a national “cultural shift” is needed in which parents, guidance counselors and others do not view vocational skilled-trades education/ apprenticeships as a second option to going to college; and
- we need to attract and educate enough skilled tradespeople to fix the declining economic health of the construction trades industry and crumbling infrastructure; and
- we need to protect the professionalism of the industry by working to keep licenses intact and ensuring that PHCC helps set crucial standards as noted by PHCC President Jonathan Moyer of Cocalico Plumbing & Heating; then

We need you! We need you to join and actively participate in PHCC’s campaign to change the trajectory of this great industry. If you are a member (thank you), then please recruit a member who can be an integral part of this important movement to protect professionalism. As Joel Long of GSM Services in Gastonia, North Carolina, and new PHCC National Vice President proclaimed “PHCC has the best opportunity to change the future ... so let’s go make a difference!” There is power and influence in numbers, and the bigger that the PHCC organization grows, the more meaningful our movement becomes. We encourage members like you to “tell your story” and enlist others to proactively protect this great industry and the health and safety of the nation.

Sources:

<sup>1</sup> Kennedy, G., PhD., Mader, R. A Heritage Unique: A History of the Plumbing-Heating-Cooling Contractors Association. Falls Church, VA: PHCC National Association; 2019.

## **Key performance indicators (KPIs)**

PHCC National’s KPIs include cost, quality and on-time performance. However, there are additional KPIs related to membership that include:

- Trial (introductory) retention rate- percentage of those trial participants go on to become full-paid members
- Conversion rate- Percentage of prospects who become introductory members
- Churn rate- how many members who were here on day one of the month are still here on the last day of the month. (ignore new members)
- Retention rate- Percent of members who received renewal invoices, paid their dues.
- Life Time Value (LTV)
  - LTV measures the revenue stream that a member will produce. (Defines the economic value produces by a typical member.)  $(\$Dues + \$Non-dues Revenue) \times Average Tenure = LTV$
  - Assuming an average tenure of 8.3 years Assuming \$300/year in dues and additional \$50/year in non-dues revenue:  $(\$300+50) \times 8.3 = \$2,950 LTV$

## **Resources**

### **Connect with Chapters**

Find your local or state chapter here: <http://phcc.mdg.agency/tools-resources/chapter-connect/>

## Membership Department Staff

**SPECTRUM CONFERENCE**

### MEMBERSHIP AND CUSTOMER SERVICE TEAM



Elizabeth Grotos, CAE  
Sr. Director, Membership Services, Customer Care  
AEC



Dawn Dalton  
Member Communities Manager  
QSC and CCA



Wilma Jenkins  
Coordinator, Member Services & Customer Care



Raylene LeGrande  
Mgr., Member Services and Customer Care



Abby Moreau  
Chapter Relations Manager



Patrice Jackson  
Coordinator, Member Services & Customer Care



A complete listing of PHCC national staff members may be [found on the website](#).

## Membership Classes

**SPECTRUM CONFERENCE**

### REVIEW OF MEMBERSHIP CLASSES

- Active – voting
  - Franchisor – New pilot at 50% discount for national dues only
- Introductory (Year 1 at 50%, Year 2 at 75%)
- Life – individual, voting
- International, Honorary, Retired
- Associate
  - Manufacturer, Educational, Trade, Design
- Preferred Affiliate



## **Installation Ceremonies**

Many times, officers or members of the Board of Directors are asked to conduct the installation of the officers for state and local affiliates. Some optional installation speeches are included below.

### **INSTALLATION OF OFFICERS #1**

#### **ELECTEES:**

YOU HAVE BEEN ELECTED BY YOUR PEERS TO SERVE THIS ASSOCIATION WITH YOUR TIME, TALENTS, EXPERTISE AND DEDICATION FOR THE TERM OF OFFICE PRESCRIBED IN YOUR BYLAWS.

YOU EXEMPLIFY THE PRINCIPLES AND PRECEPTS SET FORTH FOR THE \_\_\_\_\_ ASSOCIATION OF PLUMBING-HEATING-COOLING CONTRACTORS.

I CHARGE YOU TO UPHOLD THE PRINCIPLES AND BYLAWS OF THE \_\_\_\_\_ PLUMBING-HEATING-COOLING CONTRACTORS AND THE NATIONAL ASSOCIATION OF PLUMBING-HEATING-COOLING CONTRACTORS FOR YOUR TERM OF OFFICE.

IF YOU ACCEPT THIS CHARGE, PLEASE ANSWER "I DO."  
CONGRATULATIONS.

## **INSTALLATION OF OFFICERS #2**

### **ELECTEES:**

YOU HAVE BEEN SELECTED BY YOUR PEERS AND DULY  
ELECTED. PLEASE RAISE YOUR RIGHT HAND AND REPEAT  
AFTER ME.

“I WILL ABIDE AND ENFORCE THE BYLAWS OF  
\_\_\_\_\_ PHCC AND SERVE TO THE BEST OF MY  
ABILITY.”

I NOW PRONOUNCE YOU DULY INSTALLED, AND THE  
STATE OF \_\_\_\_\_ IS VERY FORTUNATE TO HAVE  
INDIVIDUALS OF YOUR DEVOTION TO SERVE THEM.

CONGRATULATIONS.

**INSTALLATION OF OFFICERS #3**

WILL THE FOLLOWING INDIVIDUALS PLEASE COME FORWARD AND STAND UP FRONT AS I CALL YOUR NAMES.

PRESIDENT, \_\_\_\_\_

*(ON PRESIDENT'S RIGHT)* - FIRST VICE PRESIDENT \_\_\_\_\_

*(ON PRESIDENT'S LEFT)* - SECOND VICE PRESIDENT \_\_\_\_\_

*(ON RIGHT)* - SECRETARY \_\_\_\_\_

*(ON LEFT)* - TREASURER \_\_\_\_\_

THESE TRIED AND TRUE INDIVIDUALS HAVE BEEN IN THE PROCESS OF GIVING OF THEIR TIME AND TALENTS THROUGH THE YEARS. THEY HAVE EARNED YOUR CONFIDENCE AND TRUST AND NOW YOU HAVE PLEDGED TO THEM ONE OF THE MOST VALUABLE ASSETS THAT HAS EVER BEEN BESTOWED ON US AS FREE PEOPLE IN OUR DEMOCRATIC SOCIETY.

WILL THE FOLLOWING DIRECTORS PLEASE COME FORWARD AND STAND BEHIND THIS FINE EXECUTIVE

BOARD, IF THEY ARE PRESENT. (*READ LIST*)

LADIES AND GENTLEMEN: THESE ARE THE SUPPORTING MEMBERS OF THE BOARD AND THE AGENTS OF THE ASSOCIATION TO SERVE ON THE COMMITTEES AND EXECUTE THE DUTIES AND TASKS TO MAKE THIS ASSOCIATION CONTINUE TO GO FORWARD AS IT HAS DONE SO WELL IN THESE PAST ADMINISTRATIONS.

(*TO ELECTEES*): IN THE ROLE THAT YOU ARE ABOUT TO ASSUME, YOU WILL NO LONGER BE PRIVATE CITIZENS, BUT PUBLIC SERVANTS. YOU ARE NOW OFFICERS OF THIS ASSOCIATION AND DEDICATED TO THE BEST INTERESTS OF THE PUBLIC AND TO THE WELFARE OF YOUR MEMBERS. AS NEWLY ELECTED OFFICERS, YOU ARE ENTERING A NEW ADVENTURE IN FRIENDSHIP THAT COMES ONLY THROUGH SERVICE, COOPERATION AND SHARING WITH EACH OTHER. WILL THE FOLLOWING NEW OFFICERS TAKE THEIR

PLACES FOR INSTALLATION: (*Read names of officers*):

WILL (*Name and title of office*) STEP FORWARD AND REPEAT THE OATH OF OFFICE AFTER ME: "I SOLEMNLY SWEAR - TO LIVE UP TO THE PROVISIONS - OF THE GOVERNING LAWS - OF THE ASSOCIATION - OF (*Name of association*) - AND TO DISCHARGE ALL DUTIES INCUMBENT TO MY OFFICE - TO THE BEST OF MY ABILITY."

*(Direct officer to wait for photos and step back.)*

**[Repeat the above for each of the officers individually.]**

*(Talk into the microphone BUT direct to the officers the following:)*

I NOW DECLARE YOU DULY INSTALLED AS THE OFFICERS OF THE (*Name of association*).

**[Directed to the audience]** --MEMBERS, PLEASE WELCOME YOUR NEW OFFICERS WITH A ROUND OF APPLAUSE. (*Direct Officers to wait for photos and then to return to their seats.*)

THIS INSTALLATION BEING COMPLETED~ I TURN THE PROCEEDINGS OVER TO \_\_\_\_\_

## **INSTALLATION OF OFFICERS #4**

"I, \_\_\_\_\_ , DO HEREBY SOLEMNLY PLEDGE MY WORD AND HONOR THAT I WILL, TO THE BEST OF MY ABILITY, PERFORM SUCH DUTIES AS MAY BE REQUIRED BY MY OFFICE OF AND MORE ESPECIALLY, I WILL ENDEAVOR TO CREATE HARMONY OF ACTION AND BROTHERHOOD/SISTERHOOD BETWEEN MEMBERS. I PROMISE ALSO THAT I WILL, AT THE EXPIRATION OF MY OFFICIAL TERM, TURN OVER TO THE PROPER AUTHORITIES ALL PROPERTY AND DOCUMENTS BELONGING TO THIS ASSOCIATION WHICH MAY AT THE TIME BE IN MY POSSESSION OR UNDER MY CONTROL."

**INSTALLATION OF OFFICERS #5**

LADIES AND GENTLEMEN:

I HAVE THE PRIVILEGE OF INTRODUCING YOUR OFFICERS AND DIRECTORS FOR THE COMING YEAR. YOUR ORGANIZATION, THE PHCC OF \_\_\_\_\_ (*STATE*), IS FORTUNATE TO HAVE INDIVIDUALS WHO HAVE DISPLAYED SPECIAL TALENTS AND ABILITIES, AND WILL UTILIZE THEM IN YOUR BEHALF IN THE YEARS TO COME. PLEASE COME FORWARD AS I CALL YOUR NAME:

PRESIDENT \_\_\_\_\_

VICE PRESIDENT \_\_\_\_\_

SECOND VICE PRESIDENT \_\_\_\_\_

TREASURER \_\_\_\_\_

DIRECTORS

ASSOCIATE DIRECTOR \_\_\_\_\_

OFFICERS, PLEASE ARRANGE YOURSELF FACING ME  
AND I WILL PERFORM THE HONORED DUTIES OF  
ADMINISTERING THE PLEDGE, AND HAVING YOU ACCEPT  
YOUR PARTICULAR OATH OF OFFICE. THE MEMBERSHIP HAS  
CHOSEN YOU TO BE THEIR LEADERS AND EACH OF YOU  
WILL FIND THAT WORKING AS A TEAM WITH THE COMMON  
OBJECTIVE OF IMPROVING YOUR ASSOCIATION, CAN ONLY  
BE REALIZED WITH THE TOTAL SUPPORT OF YOUR  
MEMBERS.

I AM CONFIDENT THAT YOUR COMING ON BOARD WILL  
BE THE START OF A MUTUALLY REWARDING  
RELATIONSHIP. BUT, YOU MUST ALL STRIVE TO PROMOTE A  
SPIRIT OF HARMONY, AND BE EVER WATCHFUL OF THE  
BUSINESS OF THIS ASSOCIATION, AS YOU PERFORM YOUR  
DUTIES AND ASSIGNMENTS, ACCORDING TO THE BYLAWS.  
IF YOU ARE PREPARED TO ACCEPT THIS RESPONSIBILITY  
AND PERFORM YOUR DUTIES TO THE BEST OF YOUR  
ABILITY, PLEASE SIGNIFY BY SAYING, "I DO."

CONGRATULATIONS TO YOU ALL, AND GOOD LUCK IN THE  
COMING YEAR. MAY YOU, AND ALL OF YOUR ASSOCIATION  
PROSPER UNDER YOUR GUIDANCE, WITH GOD'S BLESSING.

## Forms

The following forms are made available for your use:

1. Reimbursement Statement for Board, Executive Committee and All Other Committees – used to submit expenses (with receipts) for reimbursement,
2. Board and Committee Travel and Meetings Request Form – used to request travel
3. Zone Director Convention/Meeting Report – used to report details and actions taken at chapter meetings that you attend.

Please submit completed forms to [membership@naphcc.org](mailto:membership@naphcc.org) or fax to (703) 237-7442.



# 2019-20 - Reimbursement Statement for BOD, EC & all other Committees

Check to be made payable to: \_\_\_\_\_

Name \_\_\_\_\_ Date \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Position \_\_\_\_\_

Departure city \_\_\_\_\_ Date \_\_\_\_\_

Destination city \_\_\_\_\_ Date \_\_\_\_\_

Meeting dates: \_\_\_\_\_ to \_\_\_\_\_

In the course of my official duties, I have made the following expenditures while attending:

- Committee meeting \_\_\_\_\_
- Board of Directors \_\_\_\_\_
- State Convention \_\_\_\_\_
- Other \_\_\_\_\_

<b><u>Expenses: Documentation is required</u></b>	<b><u>Amount</u></b>
Airfare (best supersaver) _____ \$ - Spouse \$ -	\$ -
Ground transportation	
Railway _____ receipts are required	\$ -
Rental Cars & fuel (MUST obtain prior approval)	\$ -
Auto miles @ 58 cents per mile _____ miles	\$ -
Taxis/Airport transfers _____ receipts are required	\$ -
Hotel: _____ nights @ \$ - per night =	\$ -
Other Expenses (meals,tips,etc,) itemized receipts are required	\$ -
Telephone charges (attach copy of bill) =	\$ -
Other authorized expenses: (please specify)	
_____ @ \$ - =	\$ -
<b><u>Total Expenses:</u></b>	<b>\$ -</b>

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

PHCC Policy requires that expense statements must be received in the National office **within 45 days** from the last day of the meeting in order for reimbursement to be paid. See Policy 4.7 in Handbook

994 **4.7 . Travel Reimbursement**

995 4.7.1 *General.* Whenever possible, a majority of the Board of Directors, Executive  
996 Committee and/or staff should not be allowed to travel on the same aircraft.  
997 (Approved 10.02.12)

998 4.7.2 **Alcoholic Beverages.** There will be no reimbursement for alcoholic beverages  
999 without prior permission from the President. (Approved 10.02.12)

1000 4.7.3 *Board of Directors.* For the twelve elected directors, the AEC representative and  
1001 the PHCC National Auxiliary representative. (Approved 10.02.12)

1002 4.7.3.1 Board members and the AEC/Auxiliary representatives to the board must  
1003 submit a travel/meeting request form for local and other official meetings if  
1004 they plan to file for reimbursement.

1005 4.7.3.2 A fully completed current expense form must be submitted along with all  
1006 receipts. An itemized receipt is required for all expenses expected to be  
1007 reimbursed.

1008 4.7.3.3 Expense reimbursement statements must be submitted within forty five (45)  
1009 days from the last date of the meeting, for reimbursement to be paid. There  
1010 will be no exceptions. Each completed expense report will be made available  
1011 for inspection by the Executive Committee, the Board of Directors and by  
1012 members, if requested in writing.

1013 4.7.4 *State Conventions and Board of Directors' Meetings.* (Approved 10.02.12)

1014 4.7.4.1 Best air fare (21 day advance purchase)

1015 4.7.4.2 **Ground Transportation:** Members are expected to use the most economical  
1016 ground transportation appropriate under the circumstances and should  
1017 generally use the following:

- 1018 • Auto allowance as determined by the Internal Revenue Service.
- 1019 • Taxi fares with receipt
- 1020 • Parking with receipt
- 1021 • Car rental with prior approval of the president or EVP (with notification to  
1022 the president) when the cost is less than alternative methods of  
1023 transportation.
- 1024 • When driving to a meeting, reimbursement for mileage, tolls and parking  
1025 will not exceed the cost of the most economical public transportation,  
1026 parking and ground transportation



# Plumbing-Heating-Cooling Contractors Board And Committee Travel & Meetings Request Form

<p><b>Use this form to request Board and Committee meetings and/or travel</b></p> <p><b>TO:</b> President Moyer and EVP Copp</p> <p>_____</p>	<p><b>FROM:</b> _____</p> <p>_____</p> <p>_____</p>
---	---

\*Requests for a meeting must include proposed meeting agenda as an attachment.

Date Submitted \_\_\_\_\_ Committee/Chapter Name \_\_\_\_\_

Dates Requested \_\_\_\_\_ City & State meeting to be held \_\_\_\_\_

Meeting Justification:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signed \_\_\_\_\_

For Office Use Only	
Budget Approval:	<input type="checkbox"/> Travel Recommended <input type="checkbox"/> Not Recommended
Date _____	Signed _____
President Approval : Comments	
_____	
_____	
_____	
<input type="checkbox"/> Meeting Approved <input type="checkbox"/> Meeting Denied <input type="checkbox"/> Further Information Desired	

# Zone Director PHCC Convention/Meeting Report



Date _____	Signed _____
------------	--------------

Name: \_\_\_\_\_

Zone Responsible for: \_\_\_\_\_

State Convention Attended: \_\_\_\_\_

Type of Meeting Attended (Regional, Local, etc.) \_\_\_\_\_

What State was meeting held: \_\_\_\_\_

List Any New Officers Elected at The Convention Meeting:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Please Provide Next State Convention Date: \_\_\_\_\_

Next State Meeting Date: \_\_\_\_\_

List Any Federation Concerns/Problems Raised at Convention/Meeting

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_

Check-off Appropriate Committee or Group Needed to Address Member Concern/Problem.

- Board of Directors
- Executive Committee
- National Staff

Were any Resolutions presented (please attach)?  YES  NO

Status of Resolution:  PASSED  Tabled  VOTED DOWN

Were you asked to give a National Report  YES  NO

Please list any other type of report you may have been asked to give.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Please List which group/body you presented Report to?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Was there a trade exhibit connected with the convention or the meeting?  YES  NO

How many exhibitors participated? \_\_\_\_\_

(Please attach a listing of exhibitors if possible.)

Please list any comments or suggestions you may have been given.

1. \_\_\_\_\_
2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_