

SMACN-IFUS | 2024 ANNUAL REPORT



Letter from **THE CHAIR**



Dear IFUS Contributor,

I am grateful for your continued support of our work to drive our industry towards sustainable prosperity. Without your support, none of this would be possible. It is this continued passion that leads me to believe we will succeed in our singular purpose to advance our common cause.

Much like last year, we remain in a time of continuous change that challenges us to rise to the occasion. The shifting nature of our economy is opening new opportunities and exposing us to emerging challenges as well. With the shifting political climate in the United States and Canada, we are witnessing unprecedented shifts in market forces and conditions as well as changing requirements from our private and public sector stakeholders.

Thanks to your continued support of the programs and initiatives sustained by the IFUS fund, our industry has never been better equipped to navigate this landscape.

The mission of this fund remains to provide industry actors with the insight, training, and guidance needed to succeed. Throughout the past year, we have continued to push the boundaries of technological innovation. While we also aim to continue promoting the adoption of new technologies, we want to ensure that our contributors develop robust best practices for navigating the new frontiers of the digital construction workspace and leveraging rapid advances in artificial intelligence to serve their clients best.

Beyond the evolution of the technical landscape, our contributors continue to address ongoing challenges related to financial and material resources, as well as our joint workforce development efforts aimed at keeping our people at the cutting edge of this ever-changing environment. The resources and programming enabled by the fund go above and beyond meeting the challenges faced by our contributors.

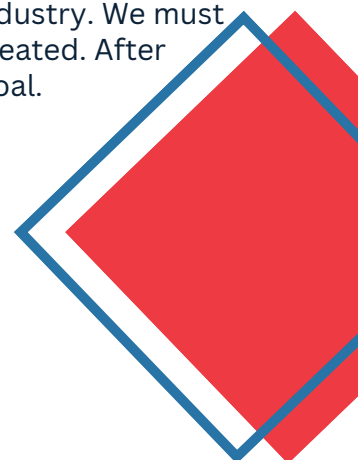
As trustees, we are responsible not only for the day-to-day management of this fund but also for promoting the general welfare of the signatory construction space. In a period like this, full of change and uncertainty, it is critical that we all serve as robust stewards of our industry. We must never yield desire to maintain the exceptional momentum we have collectively created. After reading this report, you will be satisfied with our progress towards meeting this goal.

Thank you again for your constant and steadfast support.

Sincerely,

A handwritten signature in black ink, appearing to read 'Paul Klaus', written in a cursive style.

PAUL KLAUS, PE
SMACN-IFUS chairman



2024 FINANCIAL REPORT

In 2024, the IFUS trustees approved a grant to the Sheet Metal and Air Conditioning Contractors National Association (SMACNA) to execute specific programs and projects consistent with the purposes of the trust. The grant was for a maximum expenditure of \$12,271,412, excluding the administrative fee and subject to the availability of receipts and collections.

Through the end of the year, total disbursements to SMACNA were \$10,816,733. IFUS finished the year with a \$169,795 excess, resulting in a year-end fund balance of \$462,745.

— GAVIN BROWNLIE, JR., SECRETARY/TREASURER

MAXIMUM EXPENDITURE GRANT		TOTAL DISBURSEMENT OWED TO SMACNA	
\$12,271,412		\$10,816,733	
BALANCE SHEET AS OF DECEMBER 31, 2024			
TOTAL ASSETS	\$462,745	IFUS FUND BALANCE	\$462,745

INCOME & EXPENSES AS OF DECEMBER 31, 2024

INCOME/CONTRIBUTIONS		
\$10,999,710		
EXPENSES		
TRANSFERS TO SMACNA	OTHER EXPENSES	EXCESS OF REVENUE OVER EXPENSES
\$10,816,733	\$13,182	\$462,745



SMACN-IFUS TRUSTEES

Trustees of the Sheet Metal and Air Conditioning Contractors' National Industry Fund of the United States are responsible for the general management of the trust fund. This includes the receipt of contributions and the approval, development, execution, and subsequent monitoring of programs and projects that benefit the signatory sheet metal and air conditioning industry.

- **PAUL KLAUS**, CHAIR
- **GAVIN BROWNLIE, JR.**, SECRETARY/TREASURER
- **CLAY COOKE**
- **DAN HAMPTON**
- **KURT MATTSON**
- **ADAM RENICK**
- **ADAM VIDIMOS**
- **AARON HILGER**, ADMINISTRATOR
- **DANIEL KELLY**, LEGAL COUNSEL
- **NADINE WITCHEL**, STAFF LIAISON



Industry members make contributions to the industry fund based on hours worked. The fund, through a contract with the Sheet Metal and Air Conditioning Contractors' National Association (SMACNA), develops programs and services to support the business endeavors of industry fund contributors.

INDUSTRY FUND OF THE UNITED STATES STATEMENT OF PURPOSE

Ensuring the longevity, stability, and prosperity of the sheet metal and air conditioning industry is the sole mission of the Industry Fund of the United States (IFUS).

INDUSTRY PROGRAMS INCLUDE BUT ARE NOT LIMITED TO:

- Educational opportunities
- Industry-wide public relations efforts that enhance work opportunities
- Development and promotion of technical standards that keep pace with industry advancements
- Initiatives that promote harmony between employees and employers
- Programs that assist the industry to be of greater service to the public

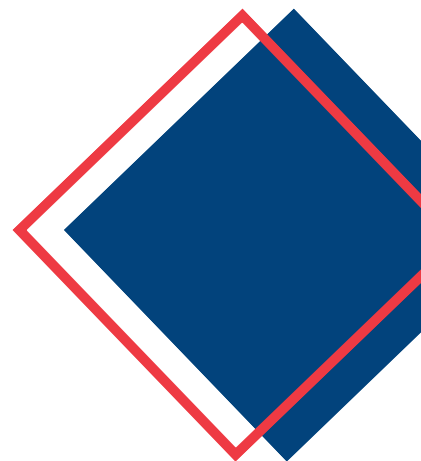
INQUIRIES ABOUT IFUS SHOULD BE DIRECTED TO:

Aaron Hilger, Administrator

Sheet Metal and Air Conditioning Contractors' National Industry Fund of the United States

4201 Lafayette Center Drive, Chantilly, VA 20151-1219

Phone: (703) 803-2980



COMMUNICATIONS & MARKETING

SMACNA's Communications and Marketing Department has been working to improve awareness within the membership of the association's activities and also to become a source of thought leadership for the general public on the pressing issues surrounding our industry.

WEBSITE REDESIGN

The new SMACNA website launched on February 5th, 2025, and has since been regarded by our members as a welcome change. We have officially entered Phase 2 of the website redesign, where we are implementing feedback from both our staff and members to ensure the site remains current and functional. Some further improvements to be announced soon include cleaner app integration, where apps communicate in the same programming language; seamless AMS integration, allowing members to access their own profiles and maintain their records, including events; and a migration from a costly platform (Azure) to a Matrix-hosted site.

In addition to our website redesign, we've also been paying close attention to our chapter websites. We currently support around 10 Chapter websites through SMACNA-hosted HigherLogic-based microsites. This has the benefit of allowing our SMACNA staff to provide support to chapters on website changes, and we can ultimately maintain brand consistency across all sites. We met with the Chapter leadership, who hosts our microsites, to gather feedback, and we're working closely with HigherLogic to make improvements that meet the Chapter's needs.

SMACNA TRADE SHOW PRESENCE

We are expanding our presence at trade shows. So far this year, SMACNA has had a booth presence at both AHR and the International Roofing Expo, which served as the premier collaborative booth in partnership with SMART.

Between 2025 and 2026, SMACNA plans to have staff in attendance at the ASHE Expo (July 27-30), FABTECH Trade Show (September 8-11 with SMART), METALCON (October 21-23), Safety & Health (TBD), International Roofing Expo (January 20-22, 2026), AHR Expo (February 2-4, 2026), IIBEC (International Institute of Building Enclosure Consultants, March 12-15, 2026), and AIHA (American Conference of Governmental Industrial Hygienists, June 1-3, 2026).

LABOR RELATIONS COLLABORATION

The Communications and Marketing team continues to work closely with SMACNA's internal Labor Relations team to accomplish several of their critical objectives. We are collaborating with SMART and SMACNA's own Labor Relations Department to enhance the quality of marketing assets surrounding all Best Practices Committee initiatives, including Partners in Progress, Mega projects, BE4ALL, National Careers in Trades Week, and joint trade shows. As we begin to gear up for the 2026 edition of the Partners in Progress Conference in Orlando in February, we are working together to enhance the messaging not only surrounding the conference itself, but also to highlight the strong labor-management relationship as much as possible.

COMMUNICATIONS & MARKETING

1ST ANNUAL NATIONAL CAREERS IN TRADES WEEK

In collaboration with SMART and ITI, SMACNA launched the first-annual National Careers in Trades Week, which ran from April 7-11. This observance is meant to spotlight the upside of our young people choosing a career in the skilled trades, and promote the industry's ability to provide a career that is lucrative and free of burdensome college debt. During the course of the week, Aaron was featured on several news programs talking about the potential of a career in our industry and what educators and school counselors should know when having conversations with rising high school seniors about their future. The launch of National Careers in Trades Week resulted in a feature story on the cover of The Wall Street Journal and a CNN interview with Angie Simon. We are also waiting on additional pending national coverage, including interviews with Oprah and Good Morning America.

SMACNA/SMART JOINT INITIATIVES

SMACNA and SMART are collaborating to develop a common database that will enable the extraction of video footage generated by each other's teams in the field. This will help keep costs down while enabling the development of exceptional content. Both teams collaborate frequently on several joint initiatives, including Partners and Progress, National Careers in Trades Week, mega projects, and Be4All. This collaboration will be an ongoing theme throughout the remainder of 2025.

COLLABORATION WITH GOVERNMENT/POLITICAL AFFAIRS

Communications and Marketing is collaborating with several departments, including Government and Political Affairs, to produce programming that will keep our member contractors informed of evolving market forces resulting from the Trump Administration. So far, we have held two member-only Zoom sessions featuring SMACNA experts to discuss what to expect from the 119th Congress and an initial look at the first 100 Days of President Trump's second term in office. We have also produced podcasts that tackle the impacts that tariffs will have on members' bottom line.

CONTENT PRODUCTION

2025 continues to see a broad expansion of SMACNA's content creation efforts. Q4 2024 and Q1 2025 featured contractor spotlight projects that highlighted the exceptional work being done by our members in the field, including in Seattle, Ottawa, and Dayton, OH. Currently, future "Contractor and Project Spotlight" episodes are planned for Dallas, Los Angeles, Chicago, and a return to Seattle in the fall of 2025, continuing the journey of Rainier Sheet Metal, one of the newest SMACNA member contractors. We have also launched a new podcast, Clear the Air, a short-form series featuring conversations with a diverse range of voices throughout SMACNA and the broader sheet metal/HVAC industry.

COMMUNICATIONS & MARKETING

MEMBERSHIP DEVELOPMENT & INNOVATION COLLABORATION

Marketing and Communications played a central role in advancing the evolving mission of the Membership Development & Innovation team. As the department continues to create and promote programs that keep members informed of emerging tools and best practices, MarComm has been a driving force in increasing the visibility of fabrication, safety, educational, and business management programs through marketing and PR efforts. Through integrated campaigns, we helped sell out the 2025 SMACNA Fab Forum, supported leadership-led sessions, and boosted visibility for key resources like the Project Manager RFI Handbook and IPD Manual, while also increasing exposure for sector-based projects. We provided cross-organizational communications coverage for the Safety and Health Conference, promoted participation in the 2025 Falls Safety Stand-Down Week, and helped position SMACNA as an innovation leader through videos and podcasts, including The Operations Hub.

We also produced video features and storytelling pieces, including Fab Forum highlights, MEP interviews, and a feature on Liz Fong (Innovator of the Year), as well as a Contractor Spotlight on Modern Niagara, to further amplify member voices.

SMACNEWS

SMACNA continues to be published as a bi-monthly magazine, maintaining 30 pages per issue in 2025. Story development is evolving to highlight not only the accomplishments of SMACNA contractors but also the efforts of the Association to advance the industry through collaboration with labor partners and peer organizations. Recently, larger projects have been featured in several editions of *SMACNews*, including H.T. Lyons' work in revitalizing downtown Allentown, PA, and Southland's work on the California Science Center's new annex, which features the Space Shuttle *Endeavour*. Logistically, we have transitioned to Mosaic, a union-approved vendor, as our provider for print and design services. Mosaic's ability to support our editorial process is incredibly robust and nearly financially neutral due to their cost-effective print and mailing framework.



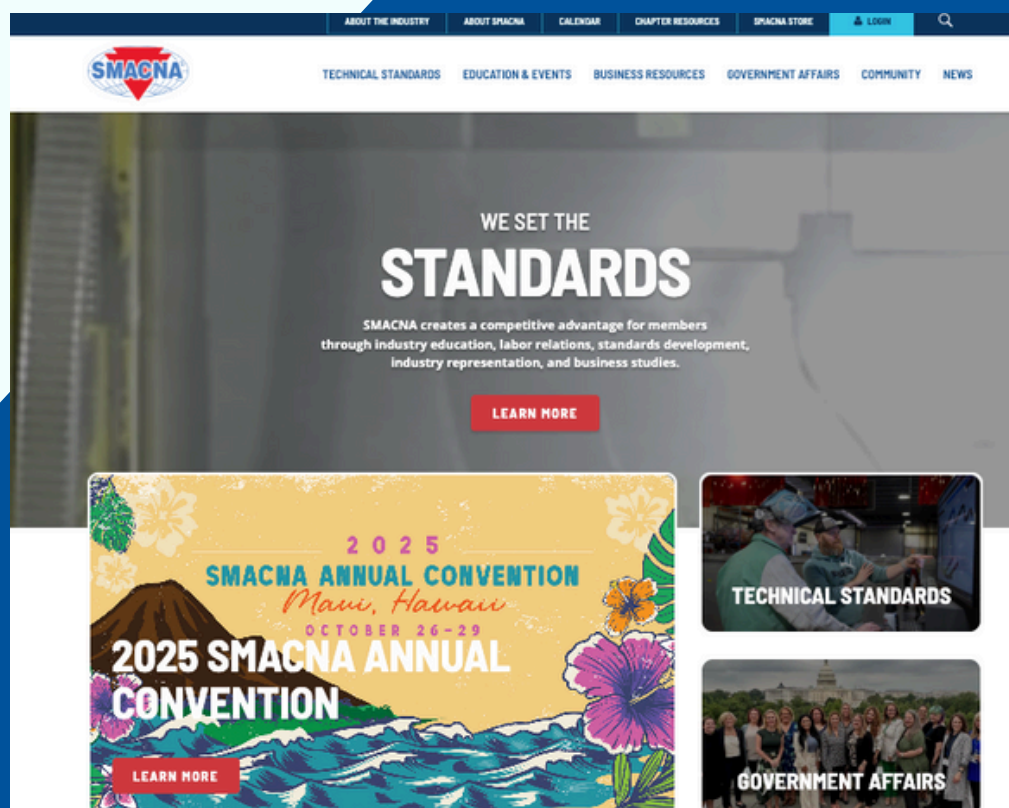
COMMUNICATIONS & MARKETING

EXECUTIVE NEWS BRIEF

This daily e-newsletter maintains very strong open and click rates and has proven to be a very valuable resource to members. In Q1 2025, distribution frequency remained at 2x per week, which has allowed SMACNA to be more selective in articles. With the ever-evolving economic climate surrounding tariffs, ENB fits a role as an information resource that equips members with the understanding needed to guide their businesses through these uncertain periods.

MEDIA OUTREACH

SMACNA continues to work with our PR agency of record to further advance our communications and public relations efforts. This year, we have focused our efforts on launching a new SMACNA-originated campaign, National Careers in Trades Week. In 2025, we will continue to expand our efforts to raise awareness among SMACNA leadership, focusing on topics such as IAQ, mega projects, new standards, tariffs, and the Heavy Metal Summer Experience.



LABOR RELATIONS

The SMACNA Labor Relations Department provided chapters and members timely guidance, legal advice, and practical advice on all labor matters.

BEST PRACTICES TASK FORCE

The SMACNA/SMART Best Practices Task Force met two times in 2025. The meeting's objective was to ensure that the Task Force was operating in accordance with the strategic plans of both SMACNA and SMART, and to continue preparations for the upcoming 2026 edition of the Partners in Progress Conference, scheduled for February 17-18, 2026, in Orlando, FL.

MEGA PROJECT TASK FORCE

The SMACNA-SMART Joint Mega Project Task Force continued its Collaboration to Support Mega Projects Implementation and Long-Term Organizational Stability and Growth for both organizations.

EMPLOYMENT SHARE REPORTS

The Employment Share Reports provided a comprehensive report to evaluate local union employment share. The Construction Labor Research Council (CLRC) developed the Employment Share Data Report that measures current union versus non-union sheet metal employment for 103 contract areas. The historical trends are useful in evaluating industry performance and planning for contract negotiations.



TARIFF WEBPAGE

Through the uncertainty of the tariff waiting game, SMACNA provided contractors with strategies for resisting financial loss, with a new tariff webpage on the SMACNA website.

LABOR RELATIONS

COLLECTIVE BARGAINING ORIENTATION

The 2025 edition of the Collective Bargaining Orientation was held January 8-9, 2025, and featured educational topics such as the basics of collective bargaining, avoiding work stoppages, and the legal framework for labor negotiations. Four Bargainers Conference Calls were also held, once per month between March and June. The calls allowed chapters and contractors to remain connected and share proposals to help enhance competitiveness, share industry bargaining trends, and help resolve any issues that surfaced during past negotiations.

WAGE AND FRINGE DATABASE

The Wage and Fringe Database is a great bargaining resource that is updated throughout the year. It tracks wage and fringe information for 107 areas and includes regional and national averages.

REGULATORY COMMENTING

Regulatory commenting continued to feature a front-and-center role in activities related to how we utilized IFUS funds. SMACNA and SMART continue to collaborate on regulatory issues of interest to the industry.



LEGISLATIVE AFFAIRS

118TH CONGRESS

We worked diligently to lobby for the passage of laws or regulations (Airport Infrastructure / Nuclear Power Financing, Permitting Reform / PLA Reform), but we had a few major issues awaiting action when Congress adjourned to close the books on the 118th Congress. These included the tax extenders package, change order reform, and the SAFER Banking Act. All are on our ambitious agenda for this year, and we are most optimistic that we can secure the tax extenders package by mid-year.

SPECIAL TRANSITION TEAM OUTREACH

SMACNA moved quickly to share its policy priorities with the Trump Transition Team leaders and the DOL Nominee Rep. Lori Chavez-DeRemer (R-OR-5) and her top staff. We also endorsed the nominee for the Senate and joined coalitions to support her nomination.

OUR LEGISLATIVE STRATEGY

Similar to the last Congress, the newly initiated Congress has been straightforward in seeking out bipartisan initiatives and building a cosponsor list to gain traction in committee across the Hill in both the House and Senate. For all the tension, dysfunction, and inter-party warfare, our bipartisan bills continue to find favor and many cosponsors on Capitol Hill. With just weeks completed in the 119th Congress, we will see progress from a high level of engagement in each arena of specialization: legislative, political and regulatory advocacy.

Our goal is to advance a few key bills of great significance to our industry and build upon our significant record amassed over the last two sessions of Congress. This includes filing detailed and consequential regulatory comments as well as aggressively advocating and advancing key policy priorities and initiatives. We continue to engage in numerous regulatory comments for the newly enacted programs funded by the landmark infrastructure, IRA, CHIPS, and Science laws. Early this year, the Government Affairs Committee identified key legislative opportunities for SMACNA, and we moved alone and in coalitions to make many of our priority goals a reality, or nearly so, by the end of 2024.



LEGISLATIVE AFFAIRS

OUR LEGISLATIVE STRATEGY (CONTINUED)

Without question, our high-level political engagement and adept legislative strategies have been key to maintaining key gains and building on them for our members, resulting in trillions of dollars in new work from laws enacted between 2021 and 2024. Protecting these tax incentives and program funds, as well as seeking renewal of the tax provisions outlined in the 2017 Act, is a priority.

We have built strong collaborative relationships with moderate lawmakers from both sides of the aisle. These individuals believe in the value of the skilled trades and enabling a highly qualified workforce capable of delivering the high-quality work that our customers are accustomed to.

Our highly active and engaged contractor and chapter executive lobbying team continues to drive SMACNA legislative advocacy efforts targeting our priorities. The work of our members continues to advance our policy priorities and convert proposals into tangible legislation.

Additionally, in 2023-24, SMACNA submitted more regulatory comments. In total, far more than any two - or four-year period in SMACNA history. Our impactful comments were shared with a variety of federal agencies, targeting our high-priority reforms, many of which were hard-fought wins over years of effort. Most of these comments have been reflected in the final rules, including those related to Davis-Bacon, Project Labor Agreements, IRA tax incentives that boost project volume, and many more.

SMACNA'S TOP ISSUES FOR THE FIRST SESSION OF THE 119TH CONGRESS

- **Endorse Extension of Key 2017 Tax Act Provisions** – R&D Tax Credit AND Section 179 Bonus Equipment Depreciation, and Sub Chapter S provisions. To be a Coalition and SMACNA effort.
- **Promote the Change Order Reform / Small Business Payment for Performance Act** – Leading to endorse change order reform bill again to provide payment on approval for half of the change order amount, expedited resolution of the remainder once certified by the contracting officer. Lobby effort will be doubled in the coming months.
- **Advocate for the SAFER Banking Act** – House and Senate bills will be reintroduced to provide access to the federal banking system for cannabis-related industry payments.
- **Commercial Building Conversion Tax Credits** – Supporting the Revitalizing Downtowns and Main Streets Act by enacting a special 20% conversion tax credit with larger credits for rural, distressed and/or low-income economic areas with older buildings.



LEGISLATIVE AFFAIRS



THREE NEW AND EMERGING SMACNA ISSUES TARGETED FOR 2025

1. **The Indoor Air Quality and Healthy Schools Act** – a bill to improve the indoor air in public schools throughout the United States. Establish a regularly updated national assessment of IAQ in schools and childcare facilities and support the development of technical assistance, guidelines, and best practices to improve the IAQ conditions of these facilities.
2. **The Indoor Air Quality Commercial Tax Credit** – Last July, Congressman Don Beyer introduced the SMACNA-endorsed The AIRBORNE Act, legislation that would incentivize non-residential building owners to conduct indoor air quality assessments.
3. **The Commercial Building Conversions Act** – This legislation addresses the growing demand for residential construction by creating a market-based tax incentive for converting older commercial buildings to residential use.

SMACNA'S LEGISLATIVE 118TH CONGRESS SCORECARD – DECEMBER 2024:

- **Endorse Extension of R&D Tax Credit AND Section 179** – Bonus Equipment Depreciation provisions (S. 866 / H.R. 2673) Coalition and SMACNA effort. Passed House / Awaited final Senate vote at adjournment.
- **Promote the Change Order Reform / Small Business Payment for Performance Act** – Leading to the endorsement of change order reform (H.R. 2726) to provide payment on approval for half of the change order amount, with expedited resolution of the remainder once certified by the contracting officer. Lobby effort will be doubled in 2025. NDAA House – Senate Conference amendment Option fell short in the “Lame Duck” session.
- **Advocate for the SAFE Banking Act** – House and Senate bills (H.R. 2891 / S. 1323) would provide access to the federal banking system for cannabis-related industry payments. Senate Banking Passage with House - Senate floor votes were pending in November and December.
- **Advance IAQ Commercial Tax Credit bill (HR 9000) and IAQ In Schools bill (HR 9131)** **Educational efforts in the House in 2024 / Will see action in 2025.**
- **Commercial Building Conversion Tax Credits (H.R. 9002)** – Supporting the Revitalizing Downtowns and Main Streets Act (H.R. 9002) by enacting a special 20% conversion tax credit with larger credits for rural, distressed, and/or low-income economic areas with older buildings. Effort to build 2024 cosponsors / 2025 action ahead.
- **Defend PLAs / Davis-Bacon** – Successfully opposed (H.J. Res. 103/H.R. 1290/H.R. 720/S. 537) repeal bills. Will continue defensive efforts in 2025.
- **Defend the IRA** tax incentives for private construction incentives / public projects.
- **Defend Funding of School Construction / IAQ** – Programs included in the American Rescue Plan are intended to support 4 years of retrofits, as well as new programs in the infrastructure and reconciliation package. **179d use is optional.

LEGISLATIVE AFFAIRS

SMACNA'S LEGISLATIVE 118TH CONGRESS SCORECARD – DECEMBER 2024 (CONTINUED):

- **Boost Registered Apprenticeship** - Support (H.R. 2851/S. 249/H.R. 2900) funds for general workforce development programs for the construction industry in DOL Appropriations, Infrastructure Act, Rescue Plan, and reconciliation package / Apprenticeship Act / Apprenticeship Hubs Act. Bipartisan support for action soon.
- **Promote Pension Reforms** - monitoring opportunities to advance our policy position as part of generic pension legislation. Build support in Congress and key agencies.
- **Substance Abuse Program Funding and Research** - (S. 1359 / S. 644) would increase access to care for people, often in the workforce, experiencing opioid use disorder (OUD) by reforming outdated regulations governing the prescription/dispensing of medications.
- **Advocate for Pro Codes Act** - (S. 832 / H.R. 1631) endorsed and supporting pending bill to boost the copyright protection of codes and standards issuing groups / coalition and SMACNA.
- **Support Nuclear Energy Financing, Licensing and Advanced Technology Act** – Now Law / Accelerating Deployment of Versatile, Advanced Nuclear for Clean Energy (ADVANCE) Act of 2023. Directs the Nuclear Regulatory Commission to expedite the development and deployment of advanced nuclear energy for the next generation of nuclear reactors. Seek additional financing, funding and permitting reforms for the Act.
- **FAA 5-Year \$130 billion Reauthorization** - New HVAC Energy Efficiency Earmarks / Terminal Energy Upgrades / Now LAW. Implement provisions in DOT and FAA.
- **Independent Contractor Regulatory Reform** – Regulatory Comment Filed / support DOL's construction reforms on Capitol Hill. Defend, if needed, the Final Rule as beneficial to union contractors.






LEGISLATIVE AFFAIRS

REGULATIONS TARGETED FOR SPECIAL 2024 ATTENTION / SMACNA COMMENTS FILED:

- **Davis-Bacon Reform** – Rules were final October 23, 2023
- **IRA Tax Incentives** Regulatory Guidance – Most key rules were final in December 2023.
- **Independent Contractor Reform** – Final rule issued mid-2024.
- **PLA Executive Order / Reform** – Final rule issued, in effect February 2024.
- **FAR Council Decarbonization** Reform – Final rule failed to be issued in Fall 2024.
- **Buy America Act** Regulatory Reform – Final rule in late 2024.
- **Cannabis Rescheduling** Reform – FDA reclassification rule comments filed, rule pending.
- **Registered Apprenticeship** Reform – Proposed final rule December 2023; comments filed but regulations withdrawn. Not expected to be reissued in a similar form.

SMACNA STATE GOVERNMENT RELATIONS

2024 was an exceptionally active year, with the number of meetings, reports, and chapter assistance growing as the year progressed. Our government affairs team is gearing up for the many state legislative sessions ongoing across the country in 2025. We are now planning to offer a more robust menu of online advocacy efforts and in-person program assistance, including coordinating state capital advocacy, as well as district visits with legislators.



MEMBERSHIP DEVELOPMENT & INNOVATION

SAFETY AND HEALTH

- Conducted the March Safety Committee Meeting with progress updates on committee workgroups (Safe Work Procedures, Canada Mental Health Summit, and DOT).
- Participated in the ANSI B11 Machine Guarding standards committee with a focus on end-user requirements.
- Participated in the ANSI A10 Construction and Demolition Standards subcommittee for lockout/tagout.
- Participated jointly (SMACNA/MCAA/NECA/TAUC) with Construction Safety Week (May 5-9) videos “A week with SMEs,” in which SMACNA created a Ladder Safety video.
- Participated as a 2025 Premier Partner with CPWR, NIOSH, and OSHA in support of the Campaign to Prevent Falls in Construction and Safety Stand-Down.
- Finalized the Press Brake Safety Training Manual update.
- Created a joint (SMACNA/MCAA/NECA/TAUC) article on “Protecting Lone Workers: Enhancing Safety for Maintenance and Repair Personnel.”
- Safety Awards update: Submissions have been collected and evaluated, with the winners to be announced at the SMACNA Annual Convention.
- Safety Sponsorship program update: We have finished collecting submissions; the winner was announced in July. (Renee Hoffman, Miller Sheetmetal)
- Participating in a joint (SMACNA/NECA/TAUC) July 2025 ASSP Conference Panel Presentation - “Enhancing Worker Engagement in Workplace Safety Through Technology.”



MEMBERSHIP DEVELOPMENT & INNOVATION

MEMBERSHIP DEVELOPMENT AND CHAPTER RELATIONS

New Contractor Members

- 31 Total
 - 24 Contractor Members Through Chapters (all US)
 - 2 International Direct Members
 - 1 Puerto Rico
 - 1 Japan
 - 5 Associate Members (all US)

Terminated Contractor Members

- 26 Total
 - 22 Contractor Members Through Chapters (21 US, 1 Canada)
 - 3 Associate Members (2 US, 1 Canada)
 - 1 International (UK Direct)

Critical Data Cleanup & Process Improvement

The AMS migration from NetSuite to NetForum was completed earlier this year, but ongoing data cleanup and configuration is ongoing. The Membership Team continues to play a key role in these efforts (i.e., deleting and merging thousands of inactive and/or duplicate records). This work is critical to improving the accuracy and integrity of member and chapter data, along with enhancing the tracking and reporting of member/chapter engagement.

An audit of the manual Associate Member and Premier Partner dues process uncovered unpaid dues, data inconsistencies, and paid members who were not properly onboarded. The Membership Team is working closely with the CFO & Accounting to correct the issues and establish a more streamlined process in NetForum.

Membership Lifecycle

The Membership Team is documenting and evaluating the existing SMACNA membership lifecycle to identify opportunities for improvement, enhancement, and streamlining. This includes onboarding new members, nurturing, engaging, and retaining existing members, as well as the annual renewal process.

Phase 1 priorities include:

- Identify existing onboarding and renewal processes; optimize tasks/roles/cadence.
- Establish a clear membership value proposition and ROI for members; highlight through an omnichannel strategy for maximum reach (website, social, member emails).
- Reimagine new member materials (i.e., welcome letter, packet contents, member benefits) to be customized by member type and apply consistent branding & messaging.
- Explore ways to leverage the renewal process to thank members for their business, reinforce membership value (quantify when possible), etc.
- Work with leadership on improvements to lifecycle process (i.e., international member application delays, billing/proration for new members).
- Research how different chapters handle onboarding new members and communicating the renewal process.
 - Identify gaps that SMACNA could assist chapters with addressing.
 - Opportunities to partner with the chapter (i.e., joint, virtual new member orientation, new member training series in development, etc).

MEMBERSHIP DEVELOPMENT & INNOVATION

CHAPTER RELATIONS

Chapter Executive Survey

In May, an online survey was conducted to

- Measure the overall satisfaction of existing SMACNA chapter resources and
- Introduce Laurie Greene, the new Director of Membership and Chapter Relations, to the Chapter Executives.

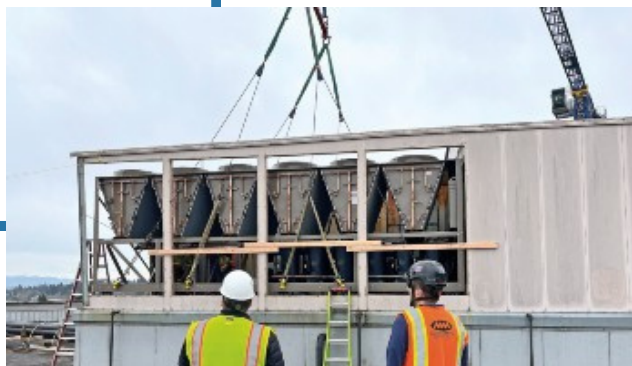
The survey email invitation was sent to 77 unique chapter executive emails in the U.S., Canada, Brazil, and Australia. The respondents indicated an 81% overall satisfaction with SMACNA chapter programs & resources.

Survey provided valuable feedback to inform better and prioritize chapter support strategies and tactics. It also established baseline metrics for future surveys.

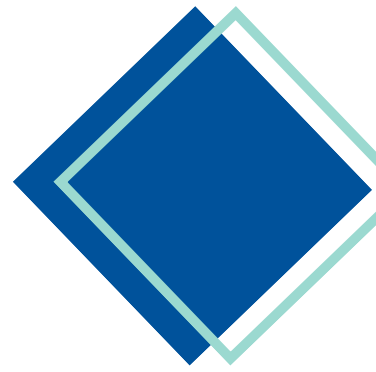
Chapter Communication

Based on ongoing feedback from chapter executives, SMACNA will be ramping up its communication to these stakeholders to be as proactive as possible in responding to their needs. Phase 1 priorities include:

- Providing regular updates to the Chapter Leadership Directory.
- Identifying more opportunities to introduce/highlight national staff to chapters and members on a regular cadence, including (but not limited to):
 - Featuring these individuals in SMACNA online and print publications
 - Additional staff-oriented content on SMACNA social media outlets
 - Feature key, member-facing national staff (name, photo, title) in SMACNA event hold slides (where appropriate).
- Building out a consistent process where chapter executives are aware of the hiring of SMACNA staff within 30 days of their joining the organization.



MEMBERSHIP DEVELOPMENT & INNOVATION



Local Education Offerings and Chapter Executive Training & Education

Several chapter executives indicated they are satisfied with many of SMACNA's existing offerings. Still, there is an increasing desire to increase and enhance local education offerings and chapter training and education, and expand topical coverage of educational programming.

Some suggestions included offering more content for business management/supervisors, such as how to manage staff, renting vs. buying a building, and more targeted content for new and seasoned chapter executives, etc.

Phase 1 priorities include:

- Evaluating existing local education programs.
- Creating a roadmap for new/updated/targeted content based on priority, resources, timing, and budget.
- Integrating new content into the website, publications, and social media.
- Facilitating chapters sharing success stories/best practices with other chapters.
- Actively seeking success stories from chapters in (i.e., Chapter Leadership newsletter, during chapter site visits).
- Update the IFCAR user guide and develop a tips/best practices webinar for chapters.

EDUCATION AND LEARNING INTEGRATION

National Programming

The attendance for our critical national-level educational programming was as follows:

- Collective Bargaining Orientation (Jan 7-9): 39 attended.
- Business Management University (Feb 24-27): 17 attended.
- Project Management Institute (Mar 9-12): 23 attended.
- Senior Project Leadership Institute (Mar 16-19): 18 attended.
- Supervisor Training Academy (Mar 23-26): 26 attended.
- Financial Bootcamp (May 19-21): 20 attended.

To ascertain membership's satisfaction with educational programming, we have standardized all program evaluations in order to compare feedback across all session offerings properly.

MEMBERSHIP DEVELOPMENT & INNOVATION

EDUCATION AND LEARNING INTEGRATION (CONT.)

Webinar Offerings

SMACNA continues to expand its webinar content. In addition to our AI series, we will be piloting additional sessions focused on the legislative and regulatory landscape. We will also feature discussions with our corporate partners on how members can leverage their business expertise to enhance their own companies.

- Video Library: All sessions are now recorded and saved so members can catch up on webinars that they missed. All are readily accessible.

Webinar Engagement Data

The AI webinar series continues to be well-attended and well-received. Building off of this positive feedback, our department collaborated with Communications and Marketing to feature AI-centric content in the July-August edition of *SMACNews*.

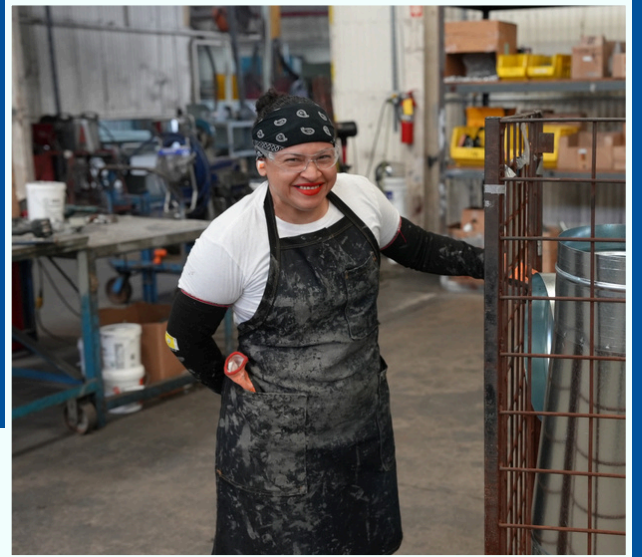


TECHNICAL SERVICES

The SMACNA Technical Services Department develops technical standards, manuals, and guidelines for worldwide acceptance in the construction/design industry and model building code community. SMACNA develops many of these standards under ANSI as an accredited standards developer. SMACNA also develops and presents technical programs for the education of the HVAC, Architectural, Industrial and design industries.

- Published the newly revised TAB Procedural Guide for TAB Field Technicians
- Successfully developed several model-building code change proposals for inclusion in future editions of the International Mechanical Code and Uniform Mechanical Code
- Created and presented multiple bespoke technical programs for SMACNA Chapters & Members, and additional technical programs for Designers in the HVAC Industry
- Assisted in submitting both oral and written testimony to various State Houses for the inclusion of Fire Life Safety programs for proper inspection and servicing of Fire/Smoke Dampers
- Technical Task Forces commenced work on the development or revisions and new documents for Laser Welding, Architectural Wall Panel Systems, HVAC Sound & Vibration, Phenolic Ductwork, Cannabis, and Kitchen Equipment








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