



Developing a High-Performance Diverse Contractor Workforce

March 27, 2024

2024 National HVACR Education Conference

Southpoint Hotel, Las Vegas

EGIA BUSINESS FOCUS



Contractor Training

- Contractor, Distributor, Manufacturer Business Optimization Training
- Comprehensive Online Learning Library, LMS, Marquee Industry Events & Onsite Training
- Preferred Training Platform for Leading OEM's and Major Distributors



Contractor Financing

- Industry Leading Financing Making Energy Efficiency & Electrification Installations Affordable
- \$9 Billion Financed with Nearly 10,000 Companies Approved
- Comprehensive Sales Training



EE Program Implementation

- Utility & Government Energy & Water Efficiency Program Administration
- Trade Ally Network Management
- Finance Program Implementation
- Contractor Training and Workforce Development

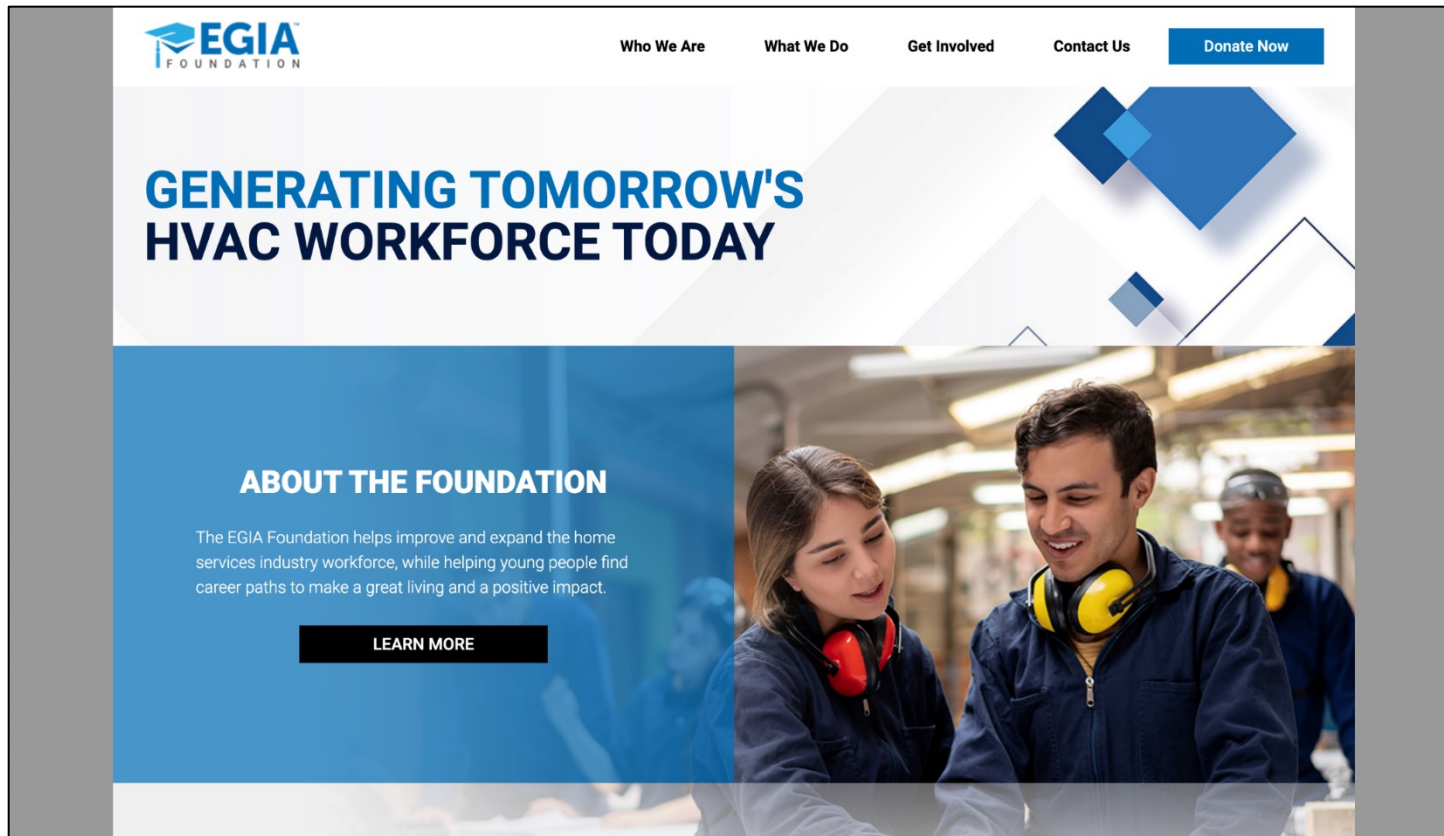


Future of HVAC

- Bridging the HVAC Employment Gap
- Drive More Youth, Woman and Minorities Into Trades
- Build Diverse Workforce
- Increase Perception of the Value of a Career in HVAC

EGIA Foundation Strategic Goals

www.EGIAFoundation.org



Drive

Drive greater public awareness about trade careers and work entailed through a national outreach campaign

Build

Build a coalition of industry partners to define and support the positioning of HVAC in a positive light

Facilitate

Facilitate mentorship, guidance and internship opportunities between HVAC companies and students

Connect

Connect contractors with HVAC program graduates looking for entry-level employment

Current State of HVAC Workforce

We all know there is a HVAC skilled labor shortage

- Current shortage of 110,000 HVAC Technicians
- 25,000+ HVAC Technicians are retiring or otherwise leaving the industry each year
- Within 5 years it is estimated there will be approximately 1.8 Technician jobs available for every job applicant.



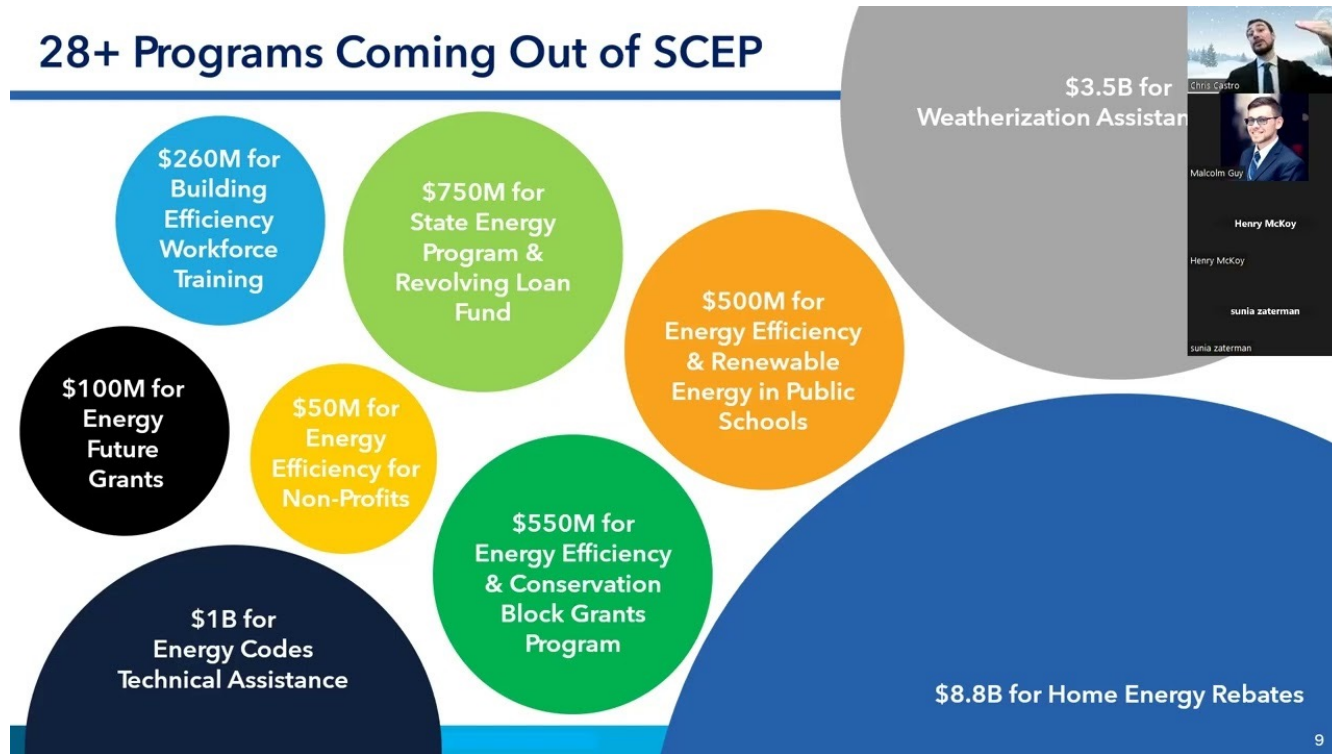
But that's only the beginning of the industry's workforce challenge

Additional Factors Impacting the Workforce?

The Inflation Reduction Act of 2022 funding will create significant demand for skilled workers

- \$8.8B in electrification rebates.
 - Approx. 70% of funds targeted to low- and moderate-income families and disadvantaged communities
- \$260M available for workforce development programs.
 - Focus on developing diversity, equity and inclusion within the HVAC industry.

28+ Programs Coming Out of SCEP



Additional Factors Impacting the Workforce?

Significant additional investment in utility funded and statewide electrification programs is driving demand for skilled workers:

- NYS Clean Heat Program.
 - \$454M statewide heat pump program.
 - Identified the need for an additional 14,000 skilled workers in NY.
- Tech Clean CA.
 - Goal to install 6M heat pumps in CA by 2030.
 - Targets 50% of funding to “equity communities”.

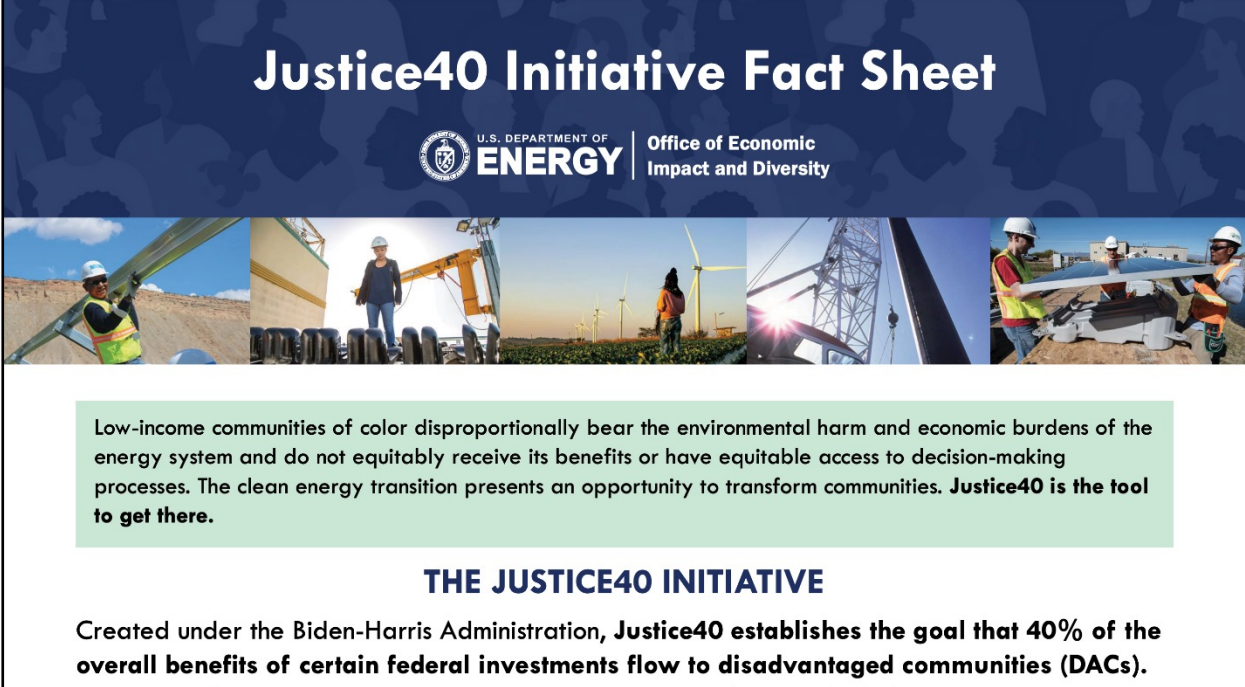


NYS Clean Heat



Workforce Diversity Focus in Most Government & Utility Funded Programs

- Increasing diversity in the contractor community and workforce supporting clean energy and energy efficiency is a key goal of the Biden administration's Justice40 initiative.
- A diverse, well trained, and motivated contractor network that is representative of the communities they serve is an essential element required to achieve these goals.



Justice40 Initiative Fact Sheet

U.S. DEPARTMENT OF **ENERGY** | Office of Economic Impact and Diversity

Low-income communities of color disproportionately bear the environmental harm and economic burdens of the energy system and do not equitably receive its benefits or have equitable access to decision-making processes. The clean energy transition presents an opportunity to transform communities. **Justice40 is the tool to get there.**

THE JUSTICE40 INITIATIVE

Created under the Biden-Harris Administration, **Justice40** establishes the goal that **40%** of the overall benefits of certain federal investments flow to disadvantaged communities (DACs).

Follow The Money: Grants, Incentives, Rebates, Training & Education Focus

How Can We Support the Industry?

Increase clean energy enterprise creation and contracting for minority or disadvantaged businesses in disadvantaged communities.

- Support the creation of businesses and their workforce who reflect the community that they serve.
- Design targeted marketing and outreach plans to increase minority and disadvantaged student awareness and enrollment.
- Develop partnerships with disadvantaged communities to increase engagement and open new pathways to recruiting students.



Developing a High-Performance Diverse Contractor Workforce

- There are many excellent programs focused on training *individuals* to be part of expected electrification transition.
- The EGIA Foundation has built a program roadmap to mentor and teach contracting business owners to build successful, sustainable businesses that serve their communities while providing lucrative career opportunities.



What's Your Diversity Recruitment Strategy?

- How are trade schools attracting greater student diversity? What are the current industry best practices in recruitment?
- What are the most effective ways to bring together trade school educators, students and employers?
- What are the best ways trade schools and contractors can work together to create an effective recruitment and job placement pipeline for students and job applicants pipeline? (mentoring, internships, job-shadowing, ride-along etc.)



Recruitment Toolkit

Recruitment Tool kit currently under development by the U.S Partnership for Education for Sustainable Development and BPI with a grant from the Pacific Northwest National Lab (PNNL) and DOE

This Toolkit is for Everyone in the Ecosystem



This Toolkit was created to serve **all players** in the **energy efficiency, home performance, HVAC, and heat pump** ecosystem, from **contractors** who are looking to grow their team of technicians to **OEM's** who are looking to recruit technicians to **educational institutions** who are looking to recruit trainees / new entrants in the industry. The Toolkit is packed with off-the-shelf materials you can use and customize for your recruitment efforts as well as tactical tips.

Recruitment Toolkit – Consistent Messaging

Use these key messages for the best recruiting outcomes. These key messages were identified from market research data and interactions with potential students, employees and an advisory council.

Key Message To Use	Explanation About Key Messages
Your Career Starts Now	For those that want a solid career progression for professional growth
Be a Company Hero	People who like to help others feel rewarded by helping people who are harmed by high energy bills, poor indoor air quality, and poorly conditioned homes.
Build a Clean Energy Future	Helps people who care about the environment understand how this career path can help end fossil fuel use, reduce pollution, and limit climate change.
Work Beyond the Cubicle	For people who prefer to be physically active, have lots of social interaction, frequently change work locations, and have a mix of physical and mental tasks at work.

Recruitment Toolkit – Consistent Messaging

Key Message To Use	Explanation About Key Messages
Earn Money	Shows that these careers can offer a quick, low-cost route to earning, with good prospects for long-term financial stability
Use The Latest Technology	For those who like to learn and solve problems, using data and technology to solve real world problems makes work engaging and rewarding.
Make Homes Comfortable, Efficient and Healthy	Focuses on the building/construction aspect of making a difference, for those who are distressed by poor quality and like to see things done right

To Review the Draft Recruitment Toolkit and Provide
Comments Go To:

<https://bit.ly/recruiting-toolkit>

Maximizing Student Competitiveness

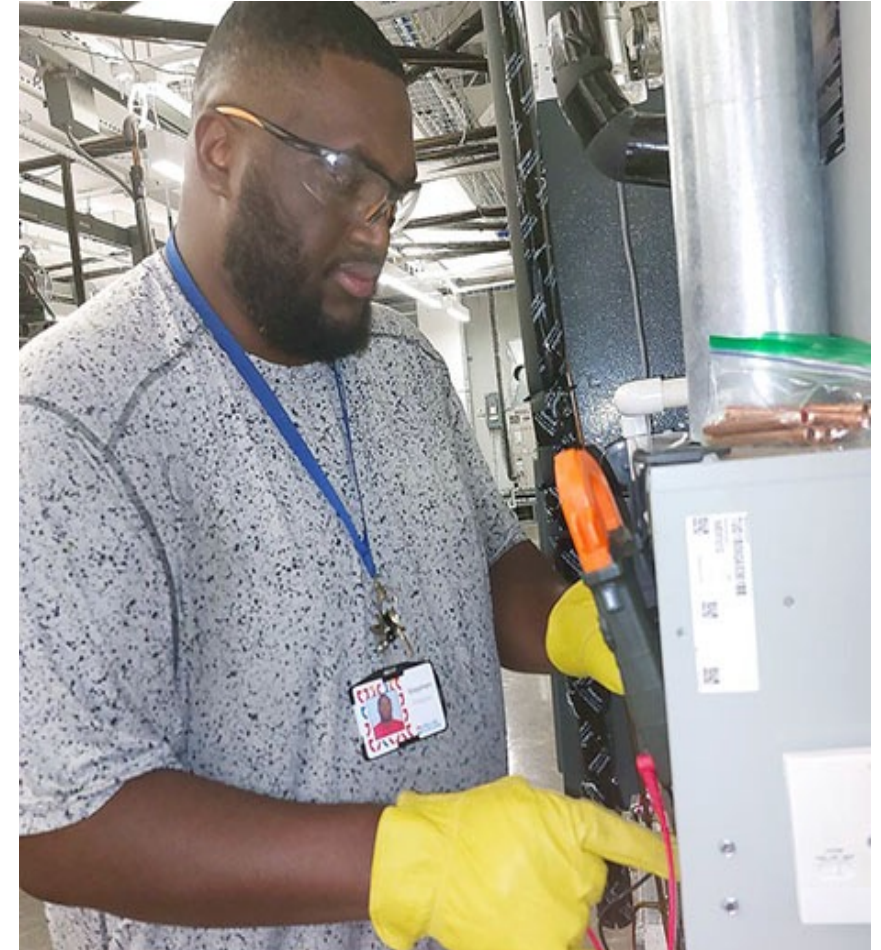


- Include basic business education as part of technical education programs to prepare workers for long term career success.
 - Online business courses can supplement hands-on technical education.
- Understanding basic business principles creates more effective employees at all career stages.
- Provide skills to start students on the path to continual career growth within the HVAC trade.

How Can We Make Grads More Competitive and Day-One Ready?

Contractor University Training Supplement?

- HVAC Contractors hire based on technical capability, work experience and cultural fit. To be fully competitive, new hires need to check ALL the boxes.
- EGIA Contractor University is proposing to work with HVAC Excellence and technical schools to develop an optimized subset of online CU courses most relevant to expanded student education, industry knowledge and best practices in business operations
- Delivered through EGIA's LMS that includes quizzes, online administrative dashboard for instructor oversight and completion certificates for successful completion of course work.
- This program will be delivered free to technical schools and students as a service provided by the EGIA Foundation.

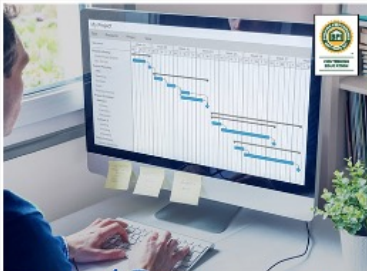













Industry-Best Business Development Training for Home Services Contractors

- Extensive platform featuring on-demand video courses, downloadable (& customizable) resources, events & more
- Serves 1,500+ member companies nationwide – contracting businesses, largely in residential HVAC
- Special partner memberships for OEM’s contractors, including Daikin, Goodman, Trane, American Standard

The screenshot shows the Contractor University website homepage. At the top, there is a navigation bar with the logo, a search bar, and links for 'Member Dashboard' and 'Log Out'. The main heading reads 'The Ultimate Business Training Platform for Contractors' followed by 'DO YOU NEED HELP WITH' and a search input field. Below this is a 'FEATURED CONTENT' section with three cards: 'CRACKING THE CODE' (Performance-Based Pay pt. 2), 'Need More Hands-on Business Coaching?' (with a photo of two men), and 'EPIC' (YACHT & BEACH CLUB RESORT). The bottom section is titled 'CONTRACTOR TRAINING' with the tagline 'Discover the Roadmap to Limitless Success'. It includes a paragraph about the platform's offerings and three image-based links: 'CONTRACTOR UNIVERSITY RESOURCE LIBRARY', 'ONLINE CLASSES', and 'EDUCATIONAL WORKSHOPS'.

Contractor University – Catalog of Online On-Demand Courses

 <p>LESSONS: 6 DURATION: 1h 8min CEU: 0.37</p> <h3>Service Management Operations</h3> <p>71%</p> <p>RESUME COURSE</p>	 <p>LESSONS: 14 DURATION: 3h 38min CEU: 1.8</p> <h3>HVAC 101</h3> <p>7%</p> <p>RESUME COURSE</p>	 <p>LESSONS: 28 DURATION: 9h 56min CEU: 4.98</p> <h3>HVAC Design Principles</h3> <p>0%</p> <p>START COURSE</p>	 <p>LESSONS: 18 DURATION: 6h 34min CEU: 2.17</p> <h3>In-Home Sales 301: Elevated Sales</h3> <p>0%</p> <p>START COURSE</p>	 <p>LESSONS: 12 DURATION: 3h 45min CEU: 1.25</p> <h3>In-Home Sales 201: Sales Execution</h3> <p>0%</p> <p>START COURSE</p>	 <p>LESSONS: 34 DURATION: 9h 9min CEU: 3</p> <h3>Sales Management</h3> <p>0%</p> <p>START COURSE</p>
 <p>LESSONS: 16 DURATION: 3h 5min</p> <h3>Mindset</h3> <p>6%</p> <p>RESUME COURSE</p>	 <p>LESSONS: 13 DURATION: 1h 59min CEU: 0.66</p> <h3>Service Agreements</h3> <p>5%</p> <p>RESUME COURSE</p>	 <p>LESSONS: 8 DURATION: 1h 45min CEU: 0.57</p> <h3>Leveraging the IRA & More to Differentiate in the Marketplace</h3> <p>0%</p> <p>START COURSE</p>	 <p>LESSONS: 5 DURATION: 1h 29min CEU: 0.50</p> <h3>Repair vs. Replace</h3> <p>0%</p> <p>START COURSE</p>	 <p>LESSONS: 17 DURATION: 3h 39min CEU: 1.2</p> <h3>Customer Service</h3> <p>0%</p> <p>START COURSE</p>	 <p>LESSONS: 46 DURATION: 6h 6min CEU: 2</p> <h3>Maintenance Technician Training & Development</h3> <p>0%</p> <p>START COURSE</p>

Contractor University – Class Catalog Continued



LESSONS: 25 DURATION: 3h 44min CEU: 1.25

In-Home Sales 101

0%

START COURSE

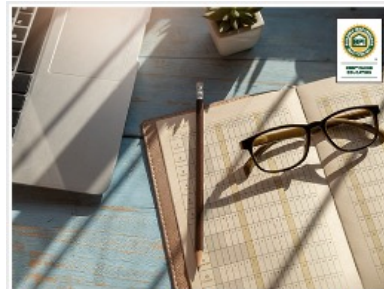


LESSONS: 17 DURATION: 5h 44min CEU: 1.9

Pricing

0%

START COURSE



LESSONS: 7 DURATION: 1h 37min CEU: 0.54

Lead Coordination

0%

START COURSE

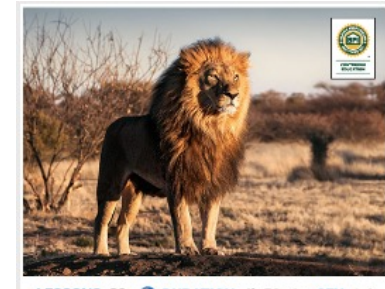


LESSONS: 13 DURATION: 2h 9min CEU: 0.72

Performance & Productivity

0%

START COURSE



LESSONS: 30 DURATION: 4h 50min CEU: 1.6

Leadership Principles

0%

START COURSE



LESSONS: 60 DURATION: 13h 30min CEU: 4.5

Service Technician Training

0%

START COURSE



LESSONS: 11 DURATION: 2h 58min

Dispatching

0%

START COURSE



LESSONS: 15 DURATION: 4h 43min CEU: 1.6

Budgeting

0%

START COURSE



LESSONS: 9 DURATION: 2h 50min CEU: 0.94

Financial Management

0%

START COURSE



LESSONS: 15 DURATION: 2h 52min CEU: 0.95

Marketing, Branding & Lead Generation

0%

START COURSE

Create a CU Curriculum That Emphasizes Non-Technical Urgencies

Repair vs Replace Course

- 5 lessons total, 90 minutes of streaming video
- Builds on technical education, rather than attempting to replace it
- Focuses on recommendations, customer experience
- Leans on technical education to identify problems, then make recommendations based on those diagnoses

CONTRACTOR UNIVERSITY
POWERED BY EGIA

Member Dashboard Log Out

REPAIR VS. REPLACE

0% COMPLETE Last activity on September 27, 2023 10:57 am

The Repair vs Replace course is designed to help guide service technicians for when they should engage a homeowner with a discussion about replacing their current system instead of repairing the current problem. This course covers the importance of having a proper mindset of putting the customer's needs first by asking questions that are centered around what is most important for the customer. The course also goes into detail on what should be included in a full professional diagnostic in order to build trust and give the customer peace of mind that every aspect of the system has been inspected. Finally, the last three lessons point out how to present fact-based data as well as deliver that information in a way that the customer can understand, along with options and solutions for them to make the best informed decision possible.

Lesson Title	Duration	Status
Professional Technician Mindset and Prep	21min	NOT COMPLETED
Performing a Full Professional Diagnostic	17min	NOT COMPLETED
Evidence-Based Data	16min	NOT COMPLETED
Cultivating a Conversation	20min	NOT COMPLETED
Options, Recommendations, Close	15min	NOT COMPLETED

Create a CU Curriculum That Emphasizes Non-Technical Urgencies

Mindset Training Course

- 16 lessons total, 3+ hours of streaming video
- Focuses on subjects like Focus, Emotional Commitment, Productivity & more
- Fills in education around establishing a mindset to consistently execute within company culture & mission
- This module is led by Weldon Long, NYT bestselling author of *The Power of Consistency*

The screenshot displays the Contractor University (CU) Mindset Training Course interface. At the top, the Contractor University logo is visible, along with navigation links for 'Member Dashboard' and 'Log Out'. The course title 'MINDSET' is prominently displayed. A progress bar indicates that the course is 6% complete, with the last activity on September 21, 2021, at 8:21 am. Below the progress bar, a brief description of the course is provided, emphasizing its focus on helping employees stay focused and motivated in the HVAC contracting industry. The main content area features a grid of 16 lesson cards, each with a title, duration, and completion status. The lessons are:

Lesson Title	Duration	Completion Status
Introduction	13min	NOT COMPLETED
Increasing Income Through Productivity	8min	COMPLETE
Weldon's Story Part 1	8min	NOT COMPLETED
Weldon's Story Part 2	10min	NOT COMPLETED
The Seemingly Inconsequential Decisions	13min	NOT COMPLETED
The Mindset Box	12min	NOT COMPLETED
The Wheel of Life	15min	NOT COMPLETED
Intro to FEAR Process	8min	NOT COMPLETED
Focus	14min	NOT COMPLETED
Focus – What You Need to Do	8min	NOT COMPLETED
Focus – Limiting Beliefs	14min	NOT COMPLETED
Emotional Commitment – Write It	11min	NOT COMPLETED

Create a CU Curriculum That Emphasizes Non-Technical Urgencies

Technician Communications Course

- 46 lessons total, 6+ hours of streaming video
- Focuses on subjects like Top Questions, Communicating with Homeowners, Social Styles & more
- Complements users' technical training with soft skills, interpersonal development

CONTRACTOR UNIVERSITY
POWERED BY EGIA

Member Dashboard Log Out

MODULE 2 – CLIENT EXPERIENCE, SALES & COMMUNICATIONS SKILLS

Maintenance Technician Training & Development - Module 2 – Client Experience, Sales & Communications Skills **IN PROGRESS**

MODULE PROGRESS **0% COMPLETE**

Lesson Title	Duration	Status
Lesson 1: Client Experience - Fixing the Customer First	5min	NOT COMPLETED
Lesson 2: Communicating With Homeowners	8min	NOT COMPLETED
Lesson 3: How to Develop WOW Relationships	13min	NOT COMPLETED
Lesson 4: Social Styles in the Trades	9min	NOT COMPLETED
Lesson 5: Asking Qualifying and Assessment Questions	6min	NOT COMPLETED
Lesson 6: Top Questions All Techs Need to Master	4min	NOT COMPLETED
Lesson 7: Checking, Confirming, Affirmations	13min	NOT COMPLETED
Lesson 8: Asking Transition Questions	7min	NOT COMPLETED
Lesson 9: Conversing About Solutions	5min	NOT COMPLETED
Lesson 10: Advancing to a Decision - Price Books	5min	NOT COMPLETED
Lesson 11: Working with Lead Coordinators	9min	NOT COMPLETED
Lesson 12: Encouraging a Conversation	3min	NOT COMPLETED

What Business-Based Topics Would Be Valuable to Schools?


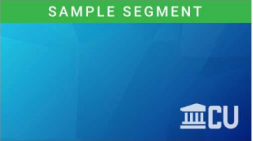










Suggestions:

- In-Home Sales
- Service Agreements
- Technician Communications
- Repair vs Replace
- Mindset Training
- Dispatching

MODULE 2 – CLIENT EXPERIENCE, SALES & COMMUNICATIONS SKILLS

Maintenance Technician Training & Development - Module 2 – Client Experience, Sales & Communications Skills IN PROGRESS

MODULE PROGRESS 0% COMPLETE

<p>SAMPLE SEGMENT</p>  <p>DURATION: 5min</p> <p>Lesson 1: Client Experience - Fixing the Customer First</p> <p>NOT COMPLETED</p>	<p>SAMPLE SEGMENT</p>  <p>DURATION: 8min</p> <p>Lesson 2: Communicating With Homeowners</p> <p>NOT COMPLETED</p>	 <p>DURATION: 13min</p> <p>Lesson 3: How to Develop WOW Relationships</p> <p>NOT COMPLETED</p>	 <p>DURATION: 9min</p> <p>Lesson 4: Social Styles in the Trades</p> <p>NOT COMPLETED</p>
 <p>DURATION: 6min</p> <p>Lesson 5: Asking Qualifying and Assessment Questions</p> <p>NOT COMPLETED</p>	 <p>DURATION: 4min</p> <p>Lesson 6: Top Questions All Techs Need to Master</p> <p>NOT COMPLETED</p>	 <p>DURATION: 13min</p> <p>Lesson 7: Checking, Confirming, Affirmations</p> <p>NOT COMPLETED</p>	 <p>DURATION: 7min</p> <p>Lesson 8: Asking Transition Questions</p> <p>NOT COMPLETED</p>
 <p>DURATION: 5min</p> <p>Lesson 9: Conversing About Solutions</p>	 <p>DURATION: 5min</p> <p>Lesson 10: Advancing to a Decision - Price Books</p>	 <p>DURATION: 9min</p> <p>Lesson 11: Working with Lead Coordinators</p>	 <p>DURATION: 3min</p> <p>Lesson 12: Encouraging a Conversation</p>

What Business-Based Topics Would Be Valuable to Schools?

- **If we offered a no-cost business supplement to your technical training, would your school opt in?**
- **What other business topics do you think would be most important?**
- **What do we need to do to streamline the process of integrating this business supplement training into your existing program?**

EGIA Foundation Scholarship Program

SCHOLARSHIP IMPACT

Since 2018, the HVAC HERO Scholarship has provided students with increased access to HVAC education and career opportunities nationwide. The data below shows the significant impact the EGIA Foundation has had in the industry.

SCHOLARSHIP DATA

105

Scholarships Awarded

\$262,500

Of Tuition Funded

32

States Represented

65

Schools Represented

Scholarships Simple Eligibility Criteria

SCHOLARSHIP REQUIREMENTS

Scholarships will be awarded based on eligibility requirements, academic merit, financial need and interest in pursuing a career in the HVAC industry. Below are the requirements for eligibility in the annual scholarship program:



Students must be enrolled* or plan to enroll in an HVAC technical program** at an accredited institution



Students must have a minimum grade point average of 2.0 on a 4.0 scale in their previous coursework



Students must be US Citizens, US Nationals or US Permanent Residents based on US Department of Education



Students Must be pursuing an Associate's Degree, Certificate or Diploma from an HVAC technical program

Preference will be given to high school seniors and students aged 18-26.

*Current students must continue to be enrolled throughout the full duration of the scholarship year – example: enrolled through January 1, 2024 for the 2023-2024 scholarship cycle

**Applicants are required to upload documentation that the eligible HVAC program is offered at the school applied to/enrolled. Employees and children of employees of EGIA and the EGIA Foundation are ineligible to apply

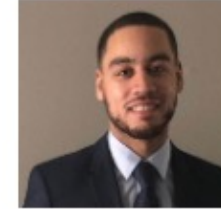
2023 Scholarship Recipients



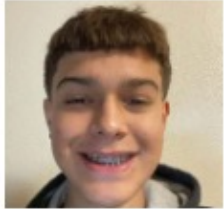
TYLER JASPER
Pennsylvania College
Lewistown, PA



IAN OROSCO
Pikes Peak State College
Colorado Springs, Co



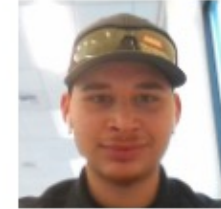
JOJUAN CAMPBELL
Columbus State Community College
Columbus, OH



JOVANNI ESPINOZA
Perry Technical Institute
Mabton, WA



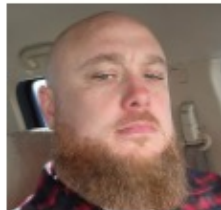
TYLER CORTES
Institute of Technology
Sutherlin, OR



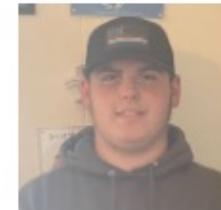
JOSEPH LAREZ
Perry Technical Institute
Harrah, WA



DAVID JENTIS
Western Technical College
El Paso, TX



ANDREW MORRIS
Perry Technical Institute
Yakima, WA



DYLAN WHIPPLE
North Georgia Technical College
Demorest, GA



JORGE ARIZPE
HVAC Technical Institute
Chicago, IL



KAHLEAL HILL
Guilford Tech Community College
Asheboro, NC



JOSH HARTMAN
Pennsylvania College
Lebanon, PA

2023 Scholarship Recipients



MATTHEW MAITLAND

Pikes Peak State College
Colorado Springs, CO



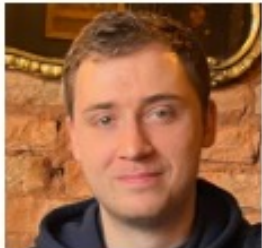
BRYAN HERNANDEZ

Delgado Community College
New Orleans, LA



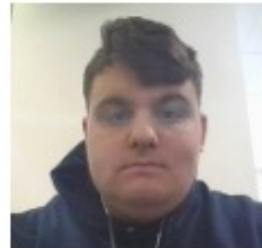
CHAD BITTLE

State Technical College
Jefferson City, MO



SEAN TERRELL

Greenville Technical College
Anderson, SC



GAVIN REUPERT

Mount St. Joseph University
Cincinnati, OH



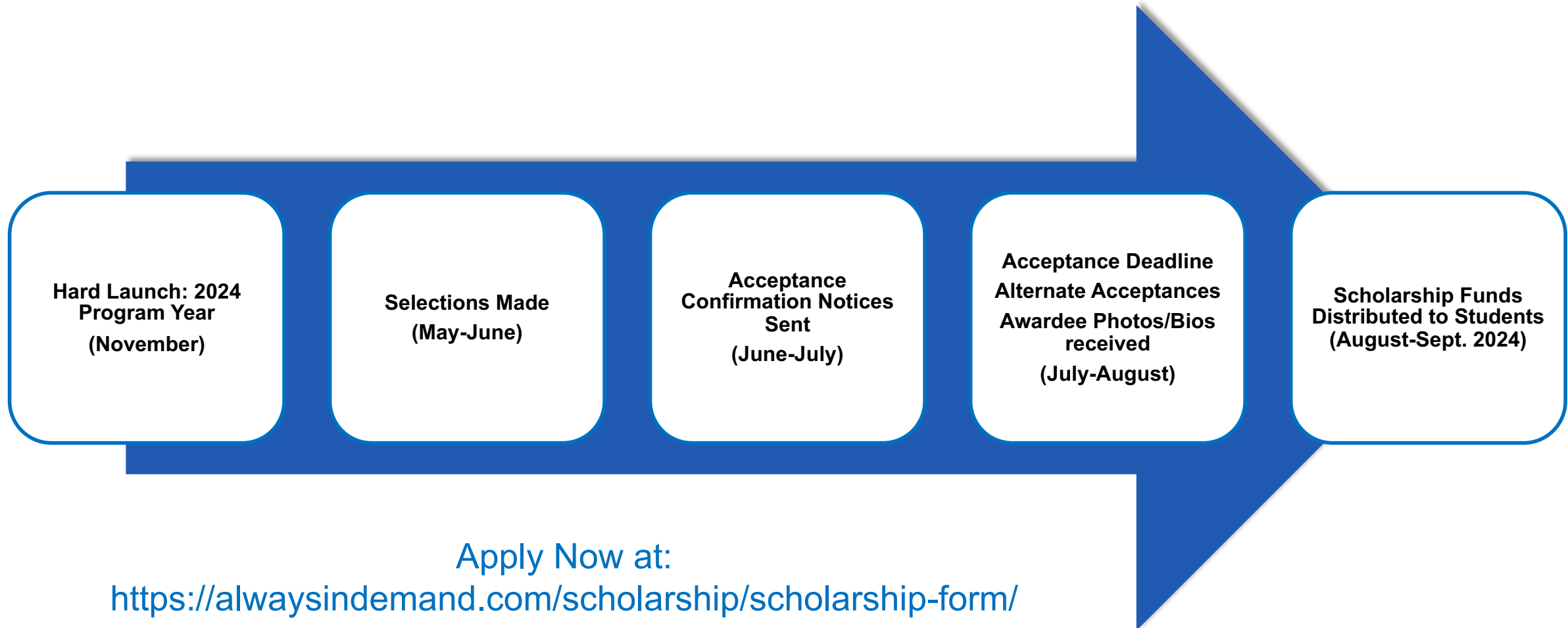
DANTE CARTER

San Joaquin Valley College
Palmdale, CA

In reviewing photos of our 2023 Scholarship winners...What's missing?

What would make this program more successful?

2024 Scholarship Awards Timeline



Want a Copy of This Presentation?

- To download a copy of these slides, scan the QR code with your phone and follow the instructions on the site
- Please reach out with any questions or to explore how we can work together

Bruce Matulich

bmatulich@egia.org

CEO, EGIA & the EGIA Foundation

