

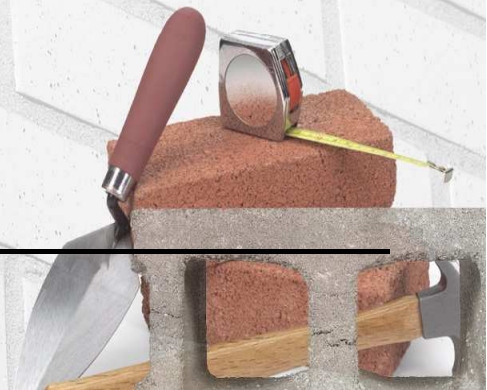
# Pat McLaughlin, President

McLaughlin Management Associates, Inc. (1996)  
(Market Research, Strategic Planning and Implementation)

Executive Director FMA&EF, Inc. (2002)

Executive Director, MAF, Inc. (2008)

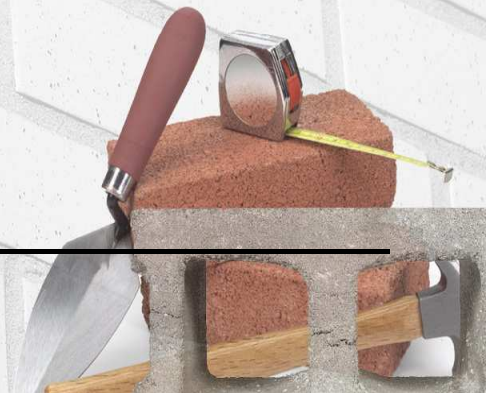
21 years WR Grace  
Finance, Sales, Marketing and  
Product Management

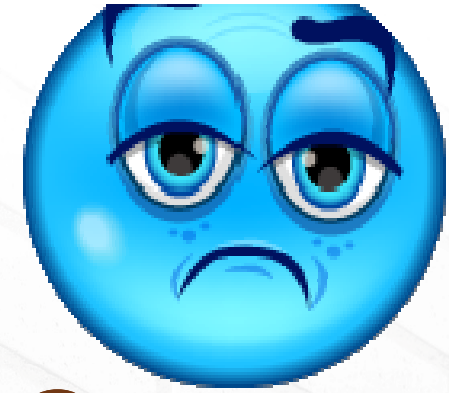


# Biggest Threat to the Masonry Industry! What will Kill us?

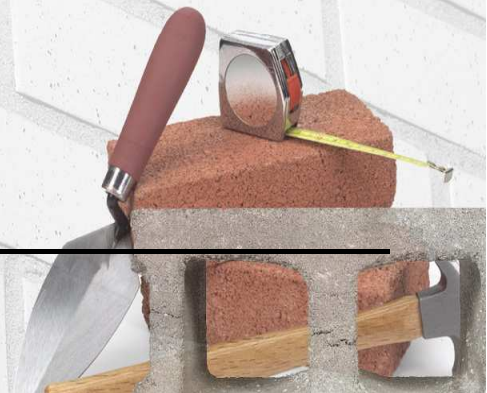
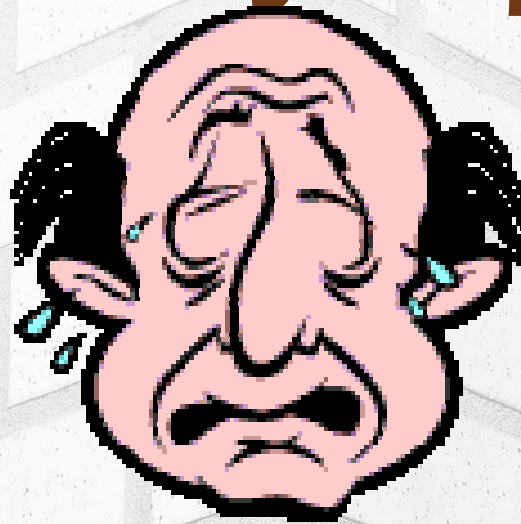
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Masonry Association of Florida, Inc. | Masonry Education Foundation, Inc.



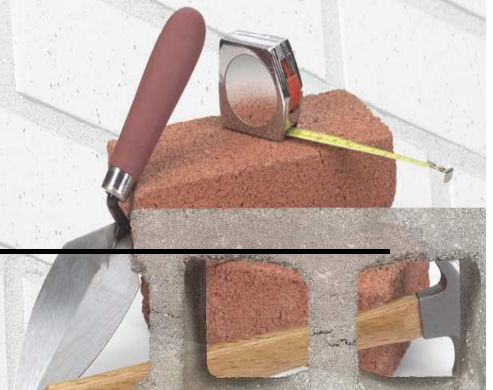


# Contractor & Industry Apathy



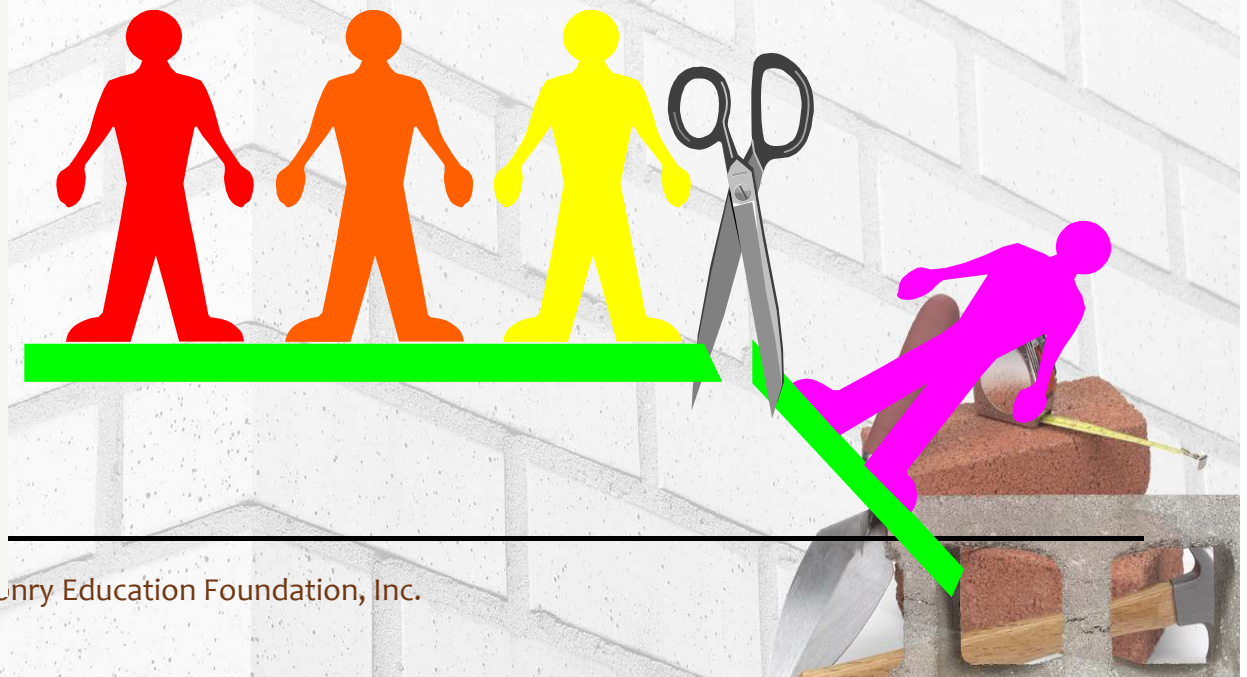
# History

- ***MAF, Inc founded in 1987***
- ***FMA&EF, Inc. founded in 2002***
- ***Revised MAF, Inc. Founded in 2008***
- ***FC&PA Producers merged into MAF in 2008***



**“We must all hang together, or  
most assuredly we will all hang  
separately”**

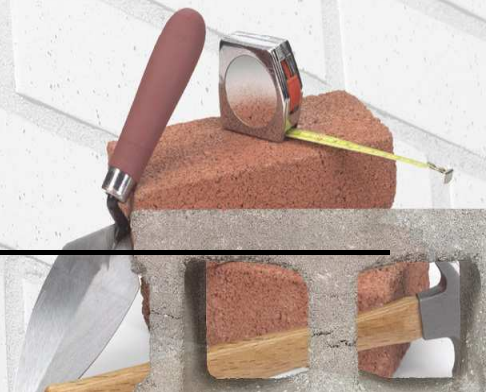
Benjamin Franklin



# *Review of '08 Strategic Plan and Results*

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Masonry Association of Florida, Inc. | Masonry Education Foundation, Inc.



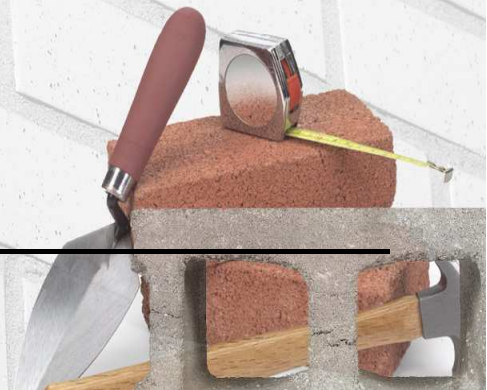
# **PRIORITY GOAL**

**2008**

**“Stop the decline in market share in Florida by December 2010.”**

**2010**

**“Increase Masonry’s Market share”**



# '08 STRATEGIC OBJECTIVES

1. Establish a system to accurately measure the market share of masonry wall systems vs. alternative systems in Florida by region & commercial/residential markets by monitoring available permits and industry statistical data.
2. Retain Professional Staff to Manage MAF.
3. By December 2010, Contractor membership will reach 150 and will represent 20% of total concrete masonry volume in Florida. Producer members will represent 95% of the total concrete block produced in Florida. The current number of Associate/Supplier members will triple. MAF will have chapters in all regions of the state.
4. Develop marketing plan to increase demand for masonry wall systems.
5. Offer a Membership Benefit Program such as group insurance that saves members money and generates revenue to MAF.
6. Re-Institute Technical Hotline.
7. Re-energize the Masonry Workshop under the aegis of MAF and the Foundation.
8. Monitor and represent masonry interests in code development





# Masonry Association of Florida, Inc.



**MAF Chapter**

- ◆ **NW Pensacola Chapter**
- ◆ **OPEN Chapter**
- ◆ **NC Chapter**
- ◆ **NE Chapter**
- ◆ **Central Chapter**
- ◆ **Treasure Coast Chapter**
- ◆ **West Central Chapter**
- ◆ **Tampa MCAF Chapter**
- ◆ **OPEN Chapter**
- ◆ **Southwest Chapter**
- ◆ **Southeast Chapter**
- ◆ **OPEN Chapter**

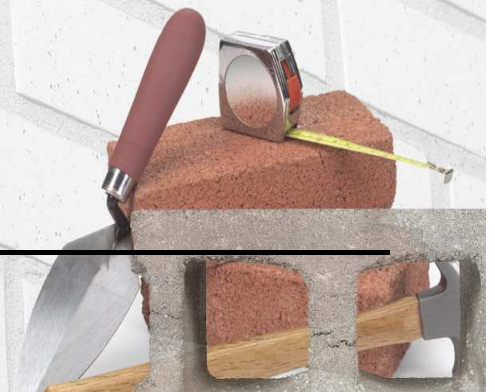
**Counties**

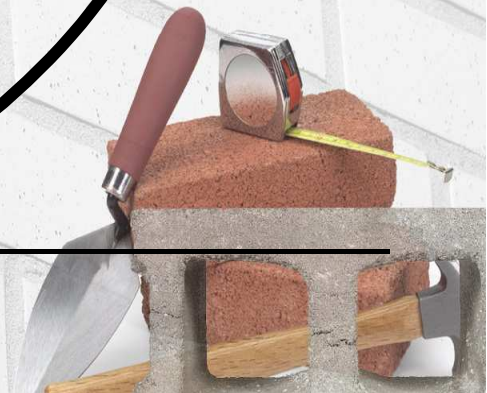
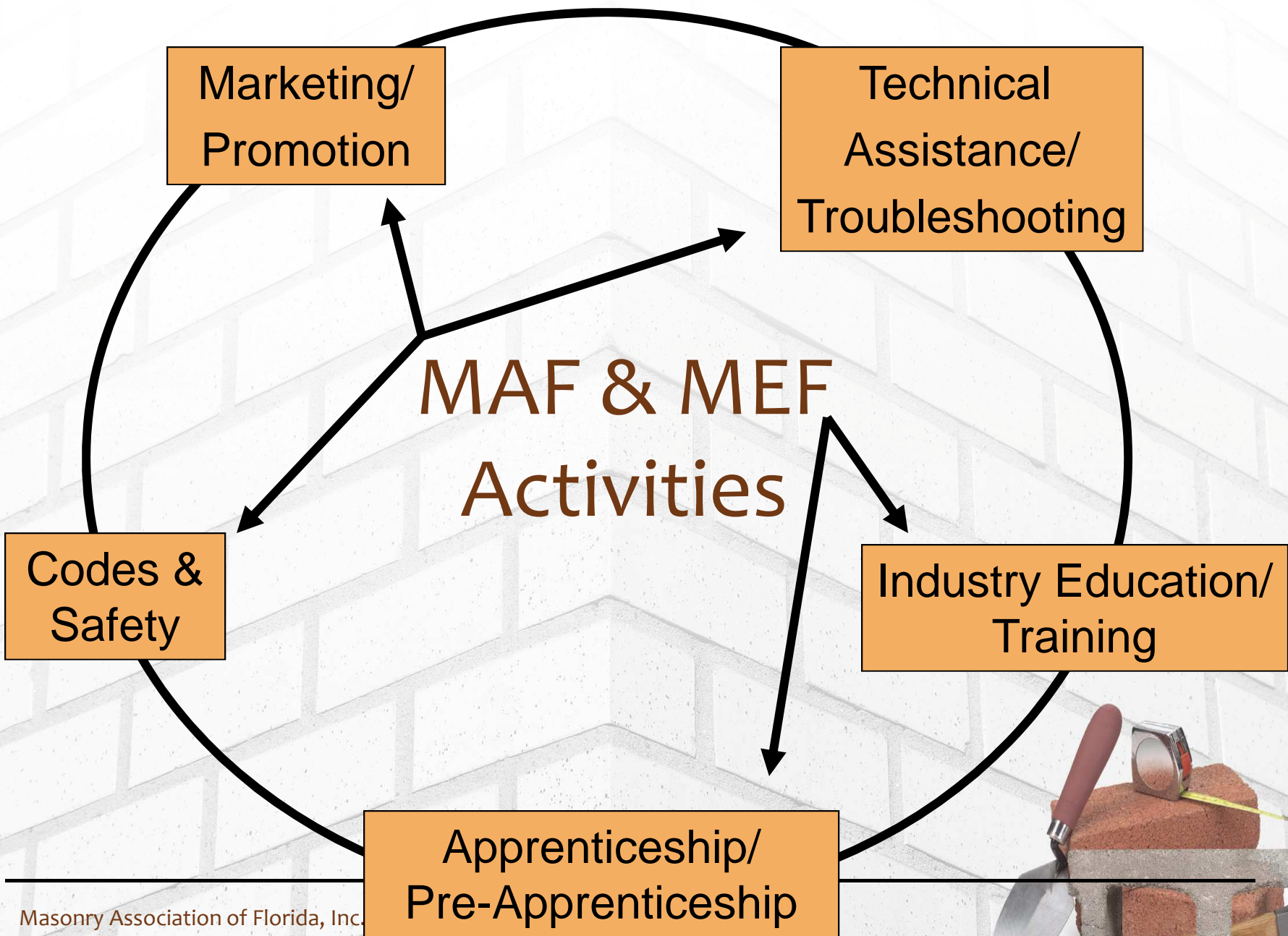
- Escambia, Santa Rosa, Okaloosa, Walton, Holmes, Washington, Bay
- Calhoun, Gulf, Liberty, Franklin, Gadsden, Leon, Jefferson, Madison, Taylor, Wakulla, Jackson
- Hamilton, Suwanee, Lafayette, Columbia, Union, Baker, Bradford, Dixie, Alachua, Levy, Gilchrist
- Nassau, Duval, Clay, Putnam, St. Johns
- Flagler, Volusia, Lake, Seminole, Orange, Osceola, Brevard
- Indian River, St. Lucie, Martin, Okeechobee
- Marion, Citrus, Hernando, Sumter
- Pasco, Pinellas, Hillsborough, Manatee, Sarasota
- Polk, Hardee, Desoto, Highlands
- Charlotte, Glades, Lee, Hendry, Collier
- Palm Beach, Broward
- Miami-Dade, Monroe

# ***Current MAF & MEF Major Activities and Manpower Resources***

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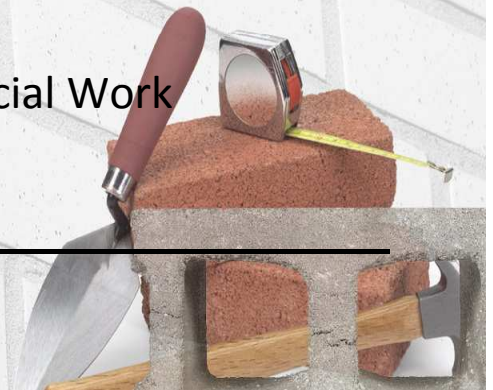
Masonry Association of Florida, Inc. | Masonry Education Foundation, Inc.





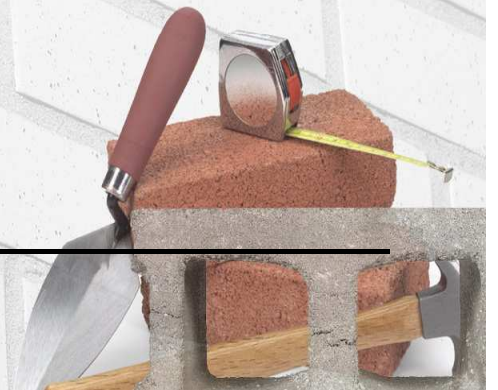
# Marketing/Promotion

- **Market Research**
  - Commercial (every 6 mo) (Contracted with Reed)
  - Residential (every 6 mo) (Florida Energy Forms compiled under contract with Uoff)
- **Community Promotion using MCAA/NCMA Vision 2020 (Masonry Ordinances)**
- **Residential Promotion (PlayBook under development)**
  - Multi-Family conversions from wood frame (Camden Construction)
- **Commercial Promotion (Playbook complete)**
  - Lunch and Learns to Architects, CMs and Owners
  - Project Tracking through Commercial Lead Tracking program (CLT)
  - Partnering and Promoting to Architects
    - Participation in AIA & FEPA Trade Shows
    - Sponsoring AIA Annual Convention
    - AIA Awards Program
    - AIA Chapter Programs
  - MilCon (Military Construction – Tampa, Jax & Pensacola)
    - National Lobbying efforts
    - Making Local contacts with Base Construction personnel
  - Development of Standard specifications for school & commercial Work



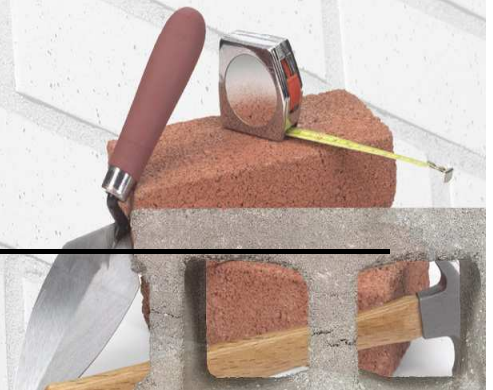
# Technical Assistance/ Troubleshooting

- **Technical Response**
  - Technical Hotline/Message Board
  - Development of Technical Brochures addressing current problems
  - Response to industry misinformation
- **Development of Technical Resources on FloridaMasonry.com**
  - Posting of Technical Brochures on Web-site
  - Links with other national technical resources such as MasonrySystems.org, NCMA and BIA



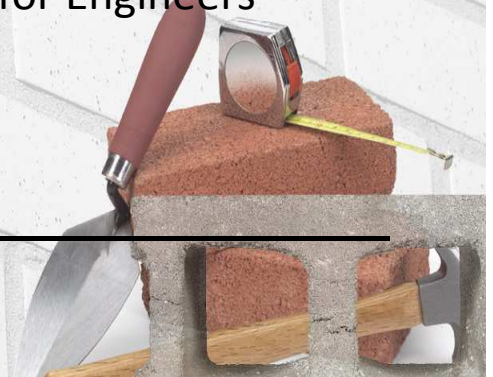
# Codes & Safety

- **Structural (State and National)**
  - Fla Codes (Participation in 2010 Fla Bldg Code process)
  - National Codes (Participation in MSJC and ASTM Code process)
- **Fire**
  - Protecting Compartmentation against Sprinklers in IBC and FBC (2 hr non-combustible)
- **Energy**
  - Thermal Mass (Research by Fla Solar Energy Center on effectiveness of Mass)
- **Sustainability**
  - Participation in MIT Concrete Sustainability Hub
- **Safety**
  - Monitor OSHA requirements



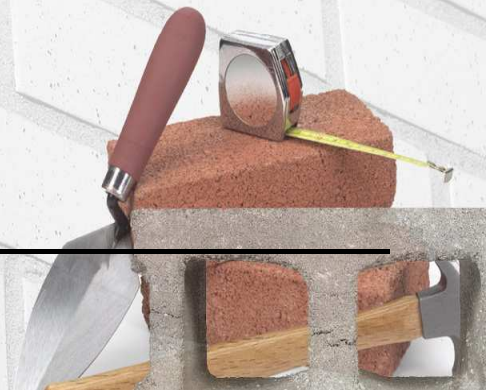
# Industry Education/Training

- **Certification Programs**
  - Masonry Certification Workshop
  - Structural Masonry Design Workshop
- **Construction Training Courses**
  - Blueprint reading
  - Application of Masonry
  - Mason Tender Program
  - Principles of Masonry Construction
  - Related Training for the skilled mason
  - Forman Leadership Skills Program
- **Technical Training**
  - Lunch and Learn Program for Architects, CMs and Owners
  - Building Officials Assoc of Fla (BOAF) partnered training of inspectors
  - Partnership with Bentley on RAM Design Software Training for Engineers
- **Safety Training**
  - OSHA 10 Hour
  - OSHA 500

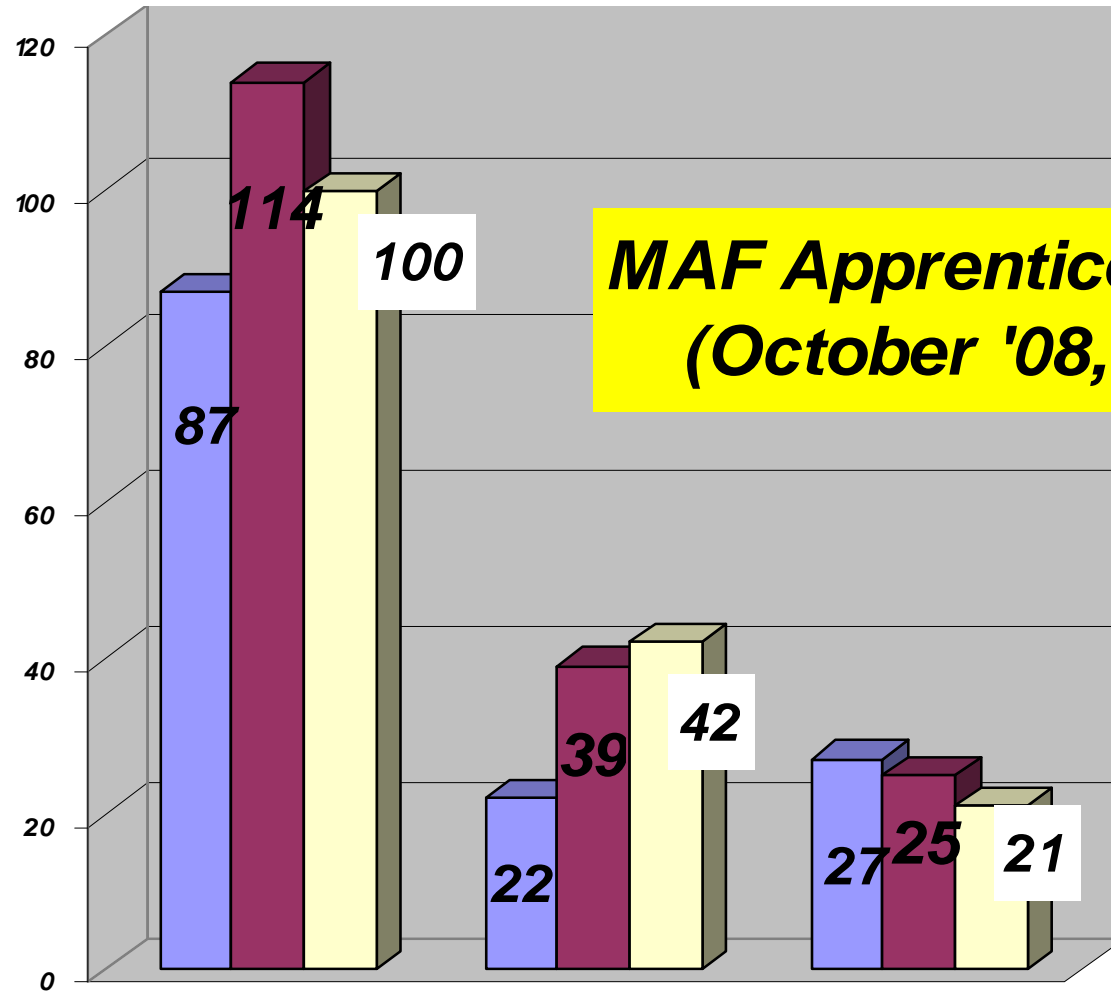


# Apprenticeship/Pre-Apprenticeship

- **Apprenticeship Training**
  - 11 Apprenticeship training programs
  - 13 Future opportunities
  - Increase # of participating employers
  - Maintain current DOE standards for each program
  - Seat on State Apprenticeship Council
  - Advisor to DOE, Legislature and Governor's office
- **Pre-Apprenticeship Training**
  - Uses NCCER Core Curriculum
  - 60 Participating schools
  - 1500+ students learning masonry
  - 320+ Certified craft instructors (NCCER ICTP)
  - Skills USA Competition
  - 8 DOC Programs statewide







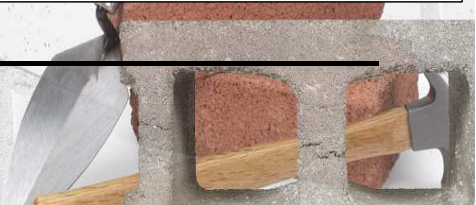
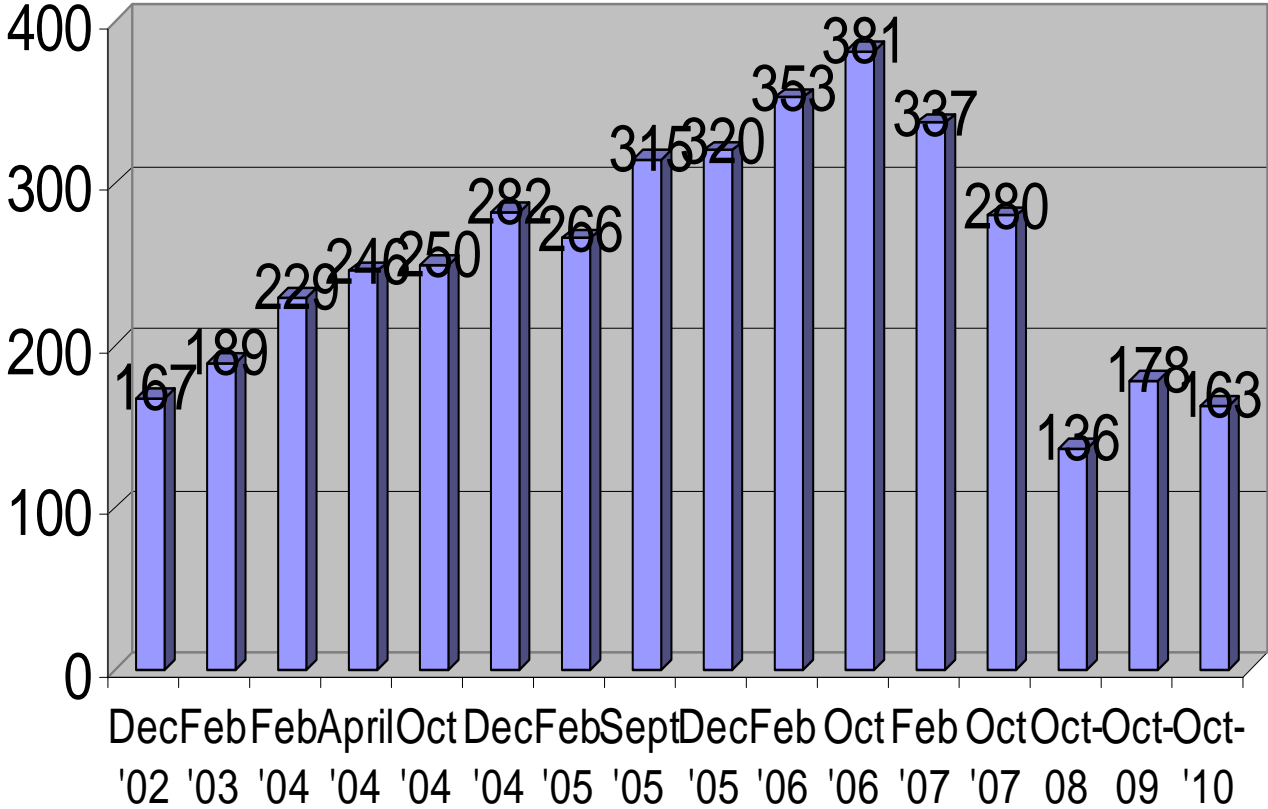
**MAF Apprentice Counts  
(October '08, '09, '10)**

■ **Oct-08**
■ **Oct-09**
■ **10-Oct**

3rd Year



# History of Foundation Masonry Apprentice Students





# MAF Strategic Plan

**2011-2012**

**MASONRY...the Intersection of Art, Innovation & Endurance.**

# Masonry Industry's Strategic Planning Retreat October 1-2, 2010



Masonry Association of Florida, Inc. | Masonry Education Foundation, Inc.

# October 1-2, '10

## Strategic Planning Session

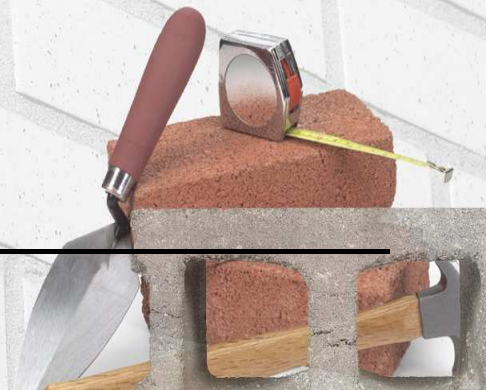
- **Steve Berry, Oldcastle Coastal**
- **Devon Brookshire, Red Brookshire of Fl.**
- **Robert Carlton, Capital Concrete & Masonry Solutions**
- **Jeff Gamel, Block USA**
- **Tom Harwood, Harwood Brick**
- **Ed Howley, Southern State Masonry**
- **Rocky Jenkins, Cemex**
- **Brian Kendall, United Masonry**
- **Kelly Kendall, United Masonry**
- **Danielle Larson, GBL Group**
- **Joe Lesstino, Cemex**
- **John Malcolm, Tarmac**
- **Shawn McGee, Oceanside Masonry**
- **Jerry Painter, Painter Masonry**
- **Bill Parsons, Pyramid Masonry**
- **Lisa Pelham, A-1 Block**
- **Dave Pfeffer, Tarmac**
- **Mike Ryan, Cast-Crete**
- **Jay Snyder, Mason-Pro**
- **Keith Sommer, Pyramid Masonry**
- **Chris Thorne, Vulcan Materials**
- **Jeff Turley, Vulcan/Florida Rock**
- **Karl Watson, Cemex**
- **Antonio Obregon, Alan W. Smith**
- **Don Beers, MAF Staff Engineer**
- **Pat McLaughlin, Facilitator**
- **Sandy Cinque, MAF Staff**

The 24 attendees represented stakeholders in the masonry industry throughout Florida - contractors, producers and suppliers. Fifteen of the nineteen MAF board members were present.



# *Florida Masonry Industry's 2011-2012 Strategic Plan*

Executive Summary  
Recap



# *Industry (Association) Overview:*

## *S.W.O.T.*

- **Strengths – Costs & Availability, Design, Life-Cycle**
- **Weaknesses – Economy, illegal business practices, alternative Systems**
- **Opportunities – Promotion, Support of Masonry Contractors & Strong Chapters**
- **Threats – Economy, Lack of Skilled Labor, Apathetic Industry**



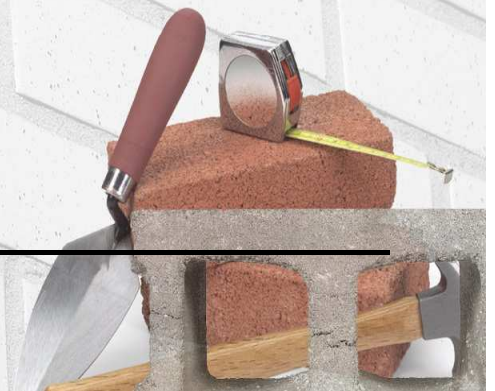
# What Is The Vision Of MAF?

**Vision:**

**How do you want the industry to be perceived?**

**Long term - 10 years**

**What we see this association, Industry, Masonry  
being?**





# Vision

***“Masonry...the intersection of art, innovation and endurance.”***

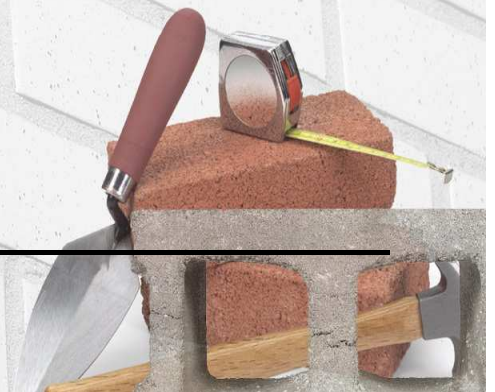
- *Masonry is a beautiful “art” form.*
- *Masonry can be used in a number of “innovative” and creative ways.*
- *And masonry “endures” forever.*



# What is the Mission of MAF?

Mission:

Supports long term vision. What we do?



# Mission

## of the Masonry Association of Florida...

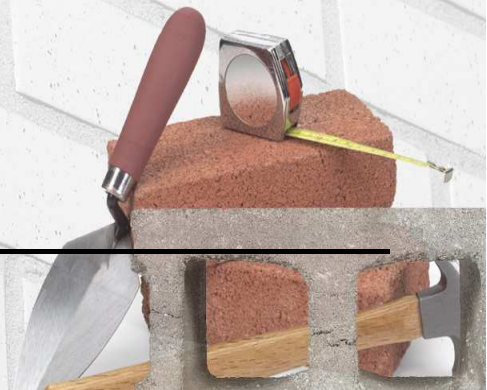
***“To represent the masonry industry’s contractors, producers and associate stakeholders to preserve, support and grow masonry construction in Florida.***

***We will accomplish this mission through promotion to increase market share, support of masonry contractors and assist local chapter organizations to thrive and grow through increased membership.”***



# The Mission identifies three strategic priorities for the future success of the MAF, and the masonry industry:

- PROMOTION TO INCREASE MARKET SHARE
- SUPPORT OF THE MASONRY CONTRACTOR
- GROW MEMBERSHIP TO STRENGTHEN LOCAL CHAPTER ORGANIZATIONS



# Masonry Industry's Strategic Goals and Objectives

1. Continue to increase market share of masonry in the construction markets.
2. Continue to identify potential masonry contractors and attract them into the association.
3. Identify, develop and implement a long term stable funding mechanism for the Association and Foundation.
4. Build, support and strengthen local masonry contractor chapters throughout Florida.
5. Strengthen masonry apprenticeship throughout Florida.
6. Build and maintain a strong pre-apprentice system feeding masonry apprentice programs.
7. Be a valuable resource to the building industry for technical information, masonry education, and support of the masonry codes and standards.



# Future – Long Term - 2015

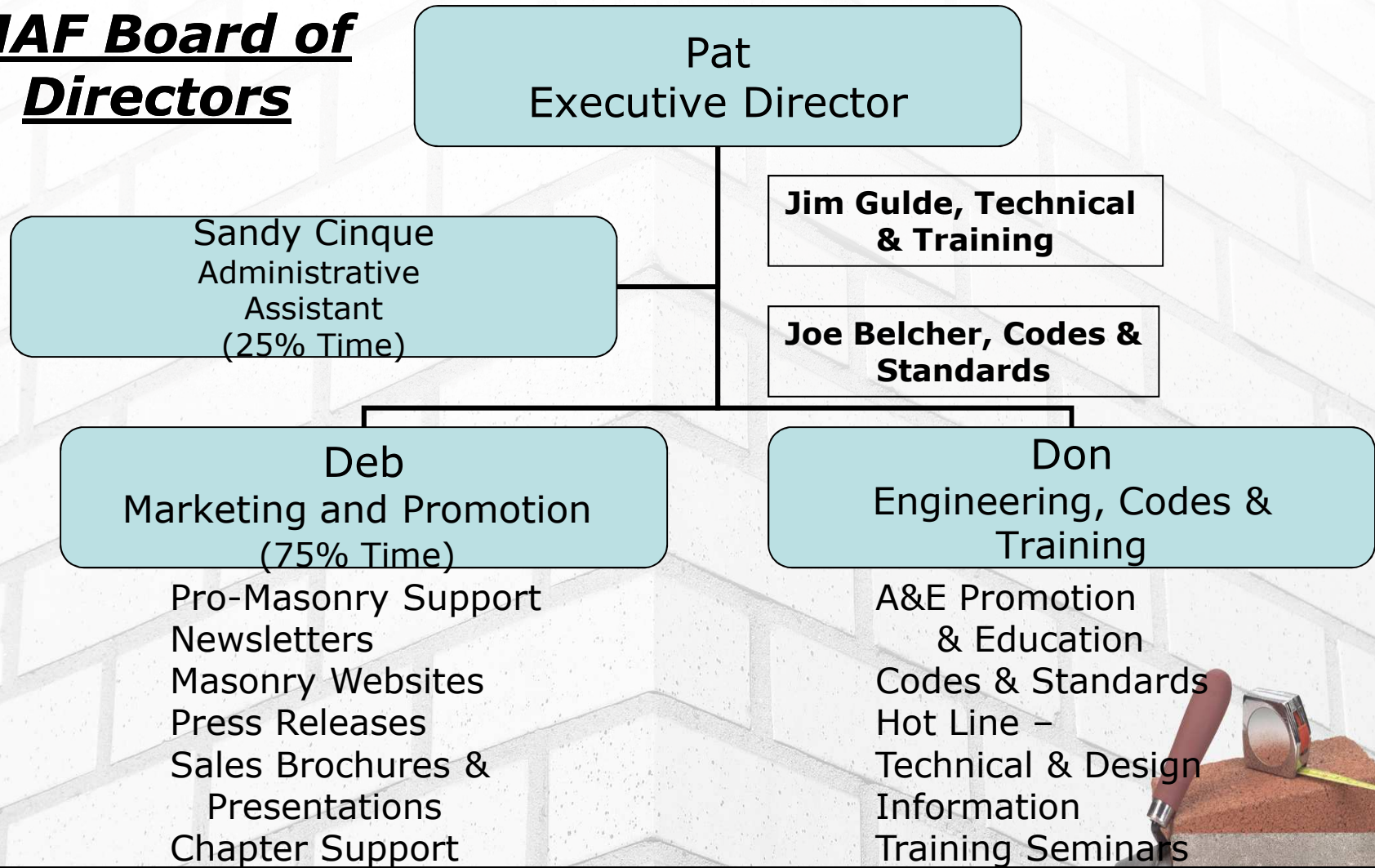
- **Be recognized as the voice of masonry and the masonry industry in Florida.**
- **Manage a contractor certification program with 100% participation of association members and at least 80% of the non-residential construction specified as requiring MAF certification.**
- **Show an identifiable career path from pre-apprentice to apprentice to a successful position in the masonry industry.**
- **Have strong, collaborative staff and volunteer leadership to effectively promote masonry designs in all building market segments – residential, non-residential and their subcategories.**
- **Will be a fully funded and functional state trade association with prudent cash reserves.**



# Masonry Association of Florida, Inc

## 2011-2012 Organization

### **MAF Board of Directors**



# MEF & MAF Organizations

## 2011-2012

### MEF Board of Trustees

Florida Masonry Apprentice & Educational Foundation

Pat McLaughlin  
Executive Director

Sandy Cinque  
Administrative Assistant  
75% MEF, 25% MAF

Al Herndon  
North Florida  
Apprentice Rep

MJ Mueller  
Central FL  
Apprentice Rep  
½ time

Dave Browning  
Southeast FL  
Apprentice Rep  
½ time

Treasure Coast &  
Southeast Programs

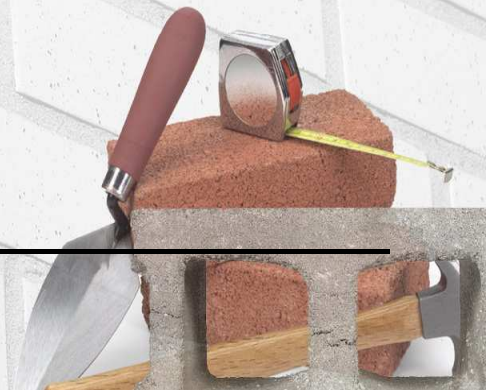
Deb Bartolucci  
Marketing,  
Promotion and Training  
Support  
75% MAF, 25% MEF

Don Beers  
Engineering,  
Codes & Training

### MAF Board of Directors

Jim Gulde, Technical  
& Training

Joe Belcher, Codes &  
Standards





# Commercial Masonry Market Share Model



# MAF Marketing Plan (Increase Market Share)

- Research and know what has happened
- Update 2X's per year
- Promotion Plan
  - Establish Market Share & Project Goals
  - Identify & Track every job in planning stage (RS Means)
  - Quantify Results (Jobs, \$, Product)
- Execute Plan
- Communicate results
  - Chapter Meetings
  - Convention



# MAF Masonry Market Share Model

- 2005 – 2008 (4-years)
- 10 Billion Dollars Tracked (approx 15% of Total approx. \$68B)
- 1,502 Projects Tracked
- 9 Construction Market Segments
- 9 Structural Wall Systems
- 32 MSA's Rolled up into 12 Chapter Markets



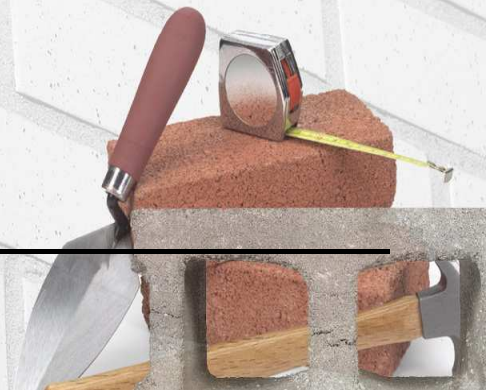
# Data Parameters

## Market Segments

- Educational
- Retail
- Multi-Fam Residential
- Commercial
- Government
- Community
- Medical
- Industrial
- Military

## Structural Wall Systems

- CIP
- CMU
- ICP
- Precast
- Tilt-Up
- Concrete Frame
- LG (Light Gauge) Steel
- Steel
- Wood



# Florida Market Areas

## Tracked Construction Volume by Chapter '05-'08

- **Central Chapter: \$2.34 Billion**
  - Deltona-Daytona Beach-Ormond Beach, FL
  - Orlando, FL
  - Palm Bay-Melbourne-Titusville, FL
  - Palm Coast
  - Sebring, FL, FL
- **Marion Chapter: \$238 Million**
  - Homosassa Springs, FL
  - Ocala, FL
  - The Villages, FL
- **Miami Dade Chapter: \$1.0 Billion**
  - Miami-Dade
  - Key West-Marathon, FL
- **North Central Chapter: \$207 Million**
  - Gainesville, FL
  - Lake City, FL
- **North East Chapter: \$1.1 Billion**
  - Jacksonville, FL
- **North West Chapter: \$517 Million**
  - Fort Walton Beach-Crestview-Destin, FL
  - Pensacola-Ferry Pass-Brent, FL
- **Polk Chapter: \$198 Million**
  - Arcadia, FL
  - Lakeland-Winter Haven, FL
  - Wauchula, FL
- **South East Chapter: \$1.17 Billion**
  - Broward
  - Palm Beach
- **South West Chapter: \$615 Million**
  - Cape Coral-Fort Myers, FL
  - Clewiston, FL
  - Naples-Marco Island, FL
  - Punta Gorda, FL
- **Tallahassee Chapter: \$416 Million**
  - Palatka, FL
  - Panama City-Lynn Haven, FL
  - Tallahassee, FL
- **Tampa Chapter: \$1.75 Billion**
  - Sarasota-Bradenton-Venice, FL
  - Tampa-St. Petersburg-Clearwater, FL
- **Treasure Coast Chapter: \$401 Million**
  - Okeechobee, FL
  - Port St. Lucie-Fort Pierce, FL
  - Vero Beach, FL



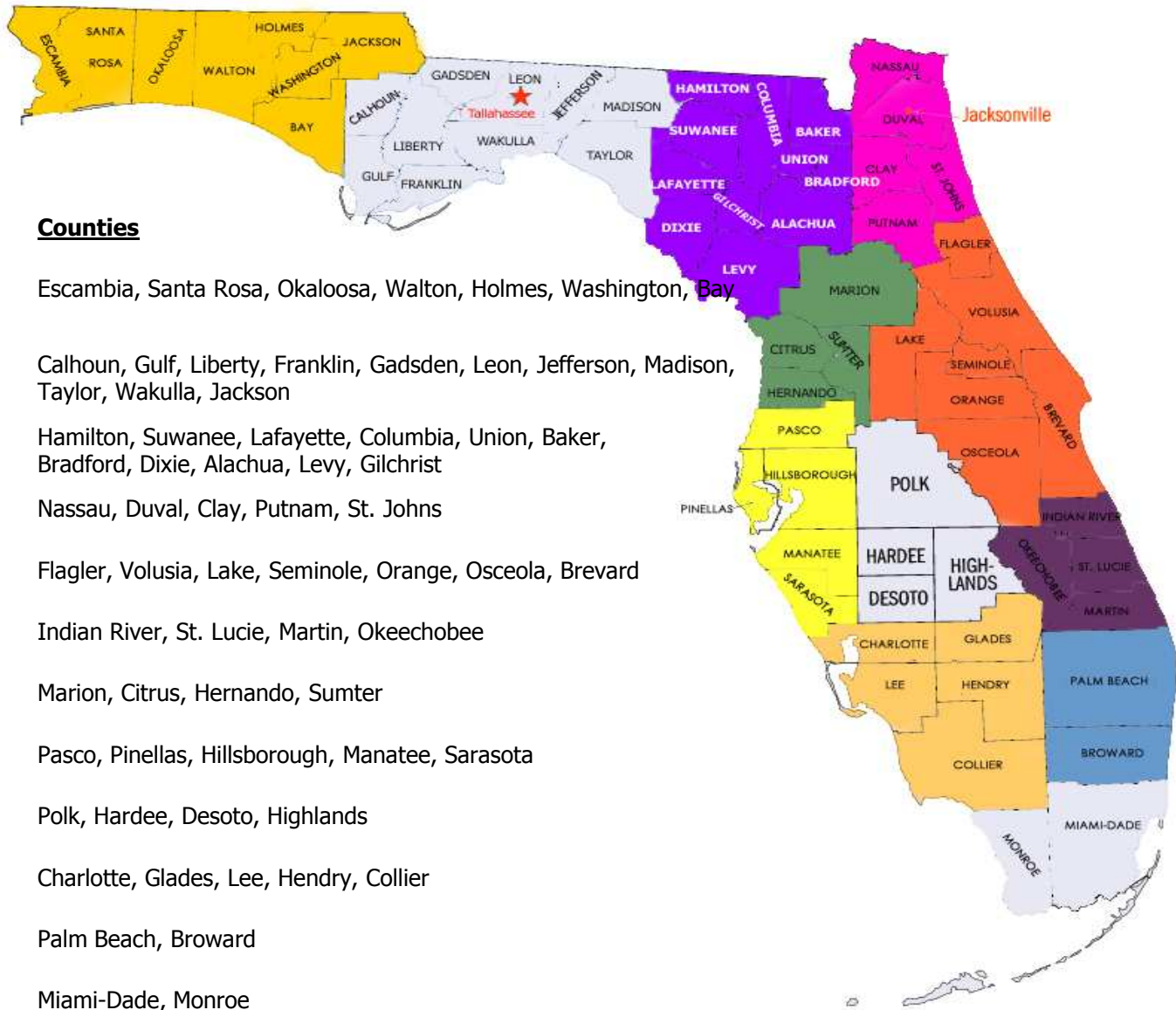
# Masonry Association of Florida, Inc.



## MAF Chapter

- ◆ **NW Pensacola Chapter**
- ◆ **OPEN Chapter**
- ◆ **NC Chapter**
- ◆ **NE Chapter**
- ◆ **Central Chapter**
- ◆ **Treasure Coast Chapter**
- ◆ **West Central Chapter**
- ◆ **Tampa MCAF Chapter**
- ◆ **OPEN Chapter**
- ◆ **Southwest Chapter**
- ◆ **Southeast Chapter**
- ◆ **Masonry Association of Florida, Inc. OPEN Chapter**

## Counties



Escambia, Santa Rosa, Okaloosa, Walton, Holmes, Washington, Bay

Calhoun, Gulf, Liberty, Franklin, Gadsden, Leon, Jefferson, Madison, Taylor, Wakulla, Jackson

Hamilton, Suwanee, Lafayette, Columbia, Union, Baker, Bradford, Dixie, Alachua, Levy, Gilchrist

Nassau, Duval, Clay, Putnam, St. Johns

Flagler, Volusia, Lake, Seminole, Orange, Osceola, Brevard

Indian River, St. Lucie, Martin, Okeechobee

Marion, Citrus, Hernando, Sumter

Pasco, Pinellas, Hillsborough, Manatee, Sarasota

Polk, Hardee, Desoto, Highlands

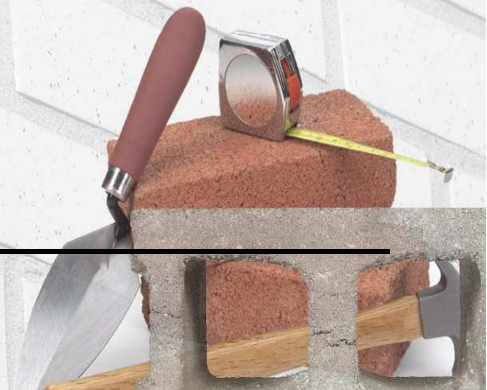
Charlotte, Glades, Lee, Hendry, Collier

Palm Beach, Broward

Miami-Dade, Monroe

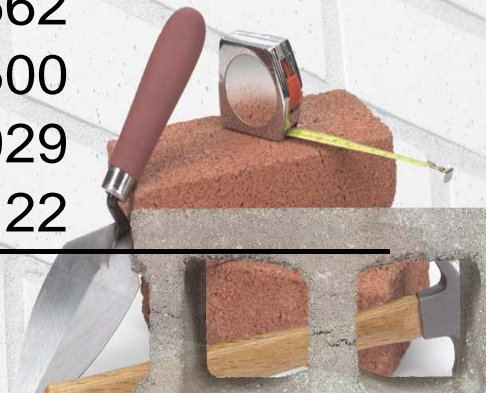
# Florida Commercial Construction Data Base

| <u>Year</u> | <u># Projects</u> | <u>Value (000)</u> |      |
|-------------|-------------------|--------------------|------|
| 2005        | 378               | \$ 2,334           |      |
| 2006        | 359               | \$ 2,944           |      |
| 2007        | 378               | \$ 2,312           |      |
| 2008        | 387               | \$ 2,388           |      |
| 2009        | 195               | \$ 615             | -74% |



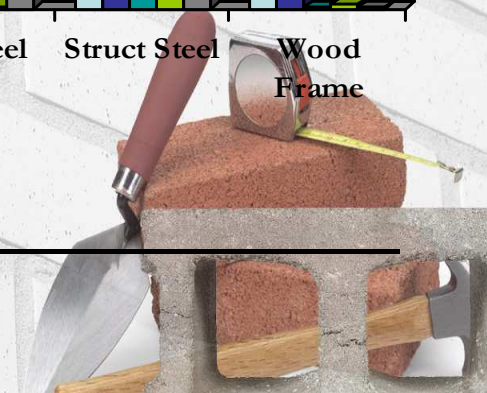
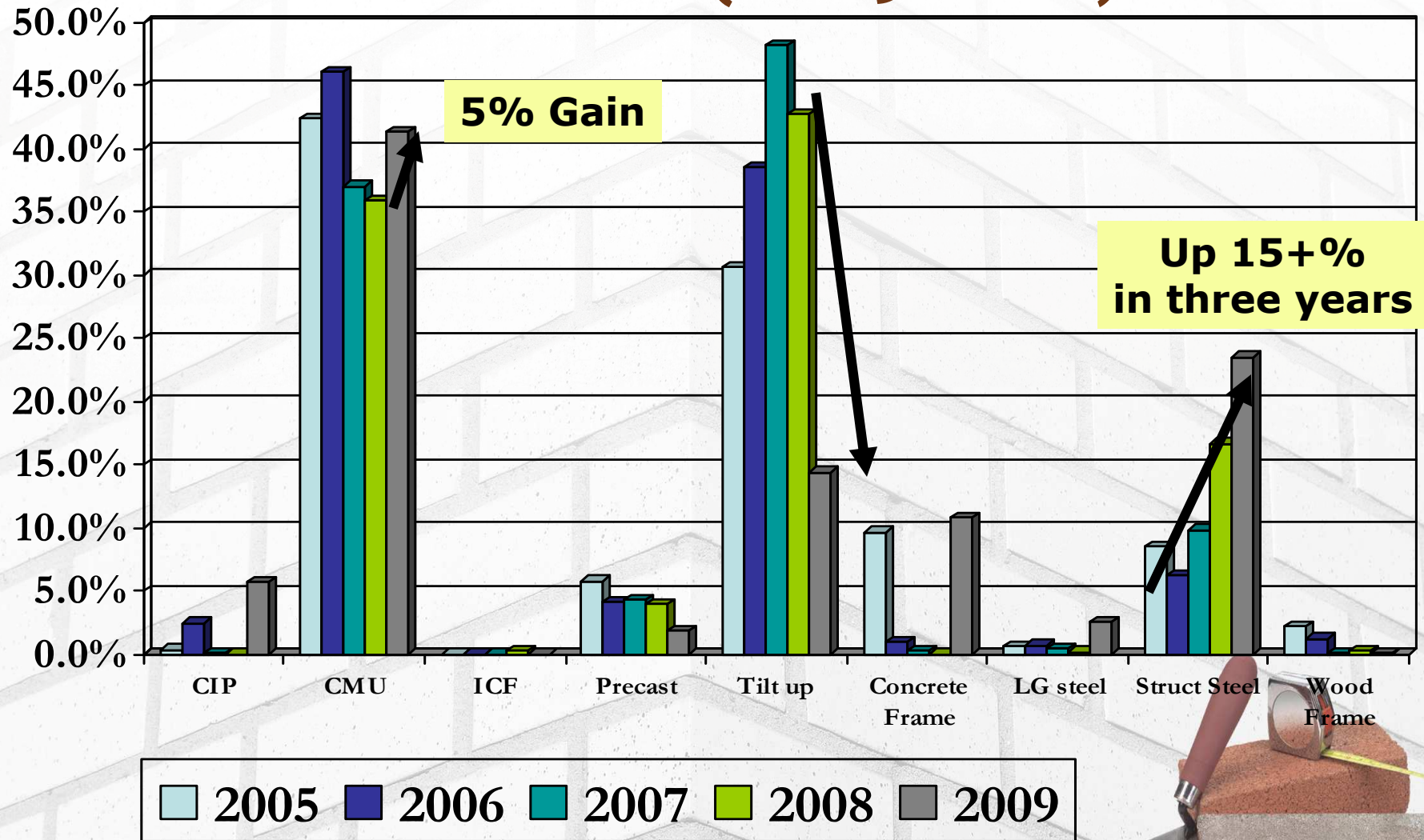
# 2009 Chapter Projects

| <u>MAF Chapter</u> | <u># of Projects</u> | <u>Total</u>          |
|--------------------|----------------------|-----------------------|
| Central            | 46                   | \$ 183,750,567        |
| Marion             | 14                   | \$ 28,992,000         |
| North Central      | 8                    | \$ 26,056,848         |
| North East         | 21                   | \$ 52,652,344         |
| North West         | 10                   | \$ 23,117,740         |
| Miami              | 17                   | \$ 85,317,056         |
| Polk               | 5                    | \$ 3,325,000          |
| Southeast          | 15                   | \$ 22,008,170         |
| South West         | 10                   | \$ 61,779,306         |
| Tallahassee        | 9                    | \$ 38,512,662         |
| Tampa              | 30                   | \$ 72,334,500         |
| Treasure Coast     | 10                   | \$ 17,161,929         |
| <b>Total</b>       | <b>195</b>           | <b>\$ 615,008,122</b> |





# Wall System Market Share Trends for Florida (2009 Gain)



# Commercial Market Conversion Goals\*

(Results in Commercial Masonry Market Share Increase)

| Year | Masonry Market Share of All Commercial Construction | % of Market Share Increase | \$ Value of Market Share Increase | # of CMU at 1 CMU/\$114 | \$ Value of Increased FL Masonry Business at \$10/sf (\$8.88/CMU) | Net \$ Profit to Industry at \$.50/cmu |
|------|---|----------------------------|-----------------------------------|-------------------------|---|--|
| 2008 | 35% (Baseline)                                      |                            |                                   |                         |   |  |
| 2010 | 40%   | 5%                         | 5% of \$14.3 Bil = \$0.7 Bil      | 6.3 MM CMU              | \$55.7 MM   | \$3.1 MM                               |
| 2011 | 45%   | 10%                        | 10% of \$14.3 Bil = \$1.4 Bil     | 12.5 MM CMU             | \$111 MM  | \$6.3 MM                               |
| 2012 | 50%   | 15%                        | 15% of \$14.3 Bil = \$2.1 Bil     | 18.8 MM CMU             | \$167 MM  | \$9.4 MM                               |
| 2013 | 55%   | 20%                        | 20% of \$14.3 Bil = \$2.8 Bil     | 25.1 MM CMU             | \$222 MM  | \$12.5 MM                              |

\*Table Based on 2008 Market Volumes With NO Increases Due to Economic Recovery



# Residential Masonry Market Share Model

**UF** UNIVERSITY of  
**FLORIDA**

College of Design, Construction and Planning  
M.E. Rinker, Sr. School of Building Construction



# Residential Masonry Model

- Florida Energy Efficiency Code for Building Construction (Form 1100A-08)
- 5% sample going to 7.5% to 10%
- Reports Data Quarterly
- Received Past Data 1999-2005
  - Caution 0.5% sample size
- Received 2009
  - 1224 houses/.05 = 24,480
  - BEBR tracked 26,097

2009 000016 CELESTRA

FORM 1100A-08  
**FLORIDA ENERGY EFFICIENCY CODE FOR BUILDING CONSTRUCTION**  
 Florida Department of Community Affairs Residential Performance Method A

Project Name: CHESAPEAKE K.M. MELBOURNE  
 Street: Sun Coast  
 City, State, Zip: Ft. Melbourne, FL 32904  
 Owner: Womack, C. S. 2004  
 Design Location: FL, MELBOURNE REGIONAL AP

Builder Name: MARONDA HOMES  
 Permit Office:  
 Permit Number: #09-0653  
 Jurisdiction: 6669

|  |  |                         |
|--|--|-------------------------|
| 1. New construction or existing              | New (From Plans)   |                         |
| 2. Single family or multiple family          | Single-family  |                         |
| 3. Number of units, if multiple family       | 1  |                         |
| 4. Number of Bedrooms                        | 3  |                         |
| 5. Is this a worst case?                     | Yes  |                         |
| 6. Conditioned floor area (ft <sup>2</sup> ) | 1637   |                         |
| 7. Windows                                   | Description  | Area                    |
| a. U-Factor:                                 | Dbl, U=0.60  | 147.00 ft <sup>2</sup>  |
| SHGC:  | SHGC=0.32  |                         |
| b. U-Factor:                                 | N/A  | ft <sup>2</sup>         |
| SHGC:  | N/A  | ft <sup>2</sup>         |
| c. U-Factor:                                 | N/A  | ft <sup>2</sup>         |
| SHGC:  | N/A  | ft <sup>2</sup>         |
| d. U-Factor:                                 | N/A  | ft <sup>2</sup>         |
| SHGC:  | N/A  | ft <sup>2</sup>         |
| e. U-Factor:                                 | N/A  | ft <sup>2</sup>         |
| SHGC:  | N/A  | ft <sup>2</sup>         |
| 8. Floor Types                               | Insulation   | Area                    |
| a. Slab-On-Grade Edge Insulation             | R=0.0  | 1637.00 ft <sup>2</sup> |
| b. N/A                                       | R=   | ft <sup>2</sup>         |
| c. N/A                                       | R=   | ft <sup>2</sup>         |
| 9. Wall Types                                | Insulation   | Area                    |
| a. Concrete Block - Int Insul, Exterior      | R=4.1  | 1176.00 ft <sup>2</sup> |
| b. Frame - Wood, Adjacent                    | R=13.0   | 224.00 ft <sup>2</sup>  |
| c. N/A                                       | R=   | ft <sup>2</sup>         |
| d. N/A                                       | R=   | ft <sup>2</sup>         |
| 10. Ceiling Types                            | Insulation   | Area                    |
| a. Under Attic (Vented)                      | R=30.0   | 1650.00 ft <sup>2</sup> |
| b. N/A                                       | R=   | ft <sup>2</sup>         |
| c. N/A                                       | R=   | ft <sup>2</sup>         |
| 11. Ducts                                    | a. Sup: Attic Ret; Interior Aft; Interior Sup. R= 6, 408.6 ft <sup>2</sup> |                         |
| 12. Cooling systems                          | a. Central Unit Cap: 35 kBtu/hr SEER: 14                                   |                         |
| 13. Heating systems                          | a. Electric Heat Pump Cap: 35 kBtu/hr HSPF: 8.2                            |                         |
| 14. Hot water systems                        | a. Electric Cap: 60 gallons EP: 0.83                                       |                         |
| b. Conservation features                     | None   |                         |
| 15. Credits                                  | Pstat  |                         |

Glass/Floor Area: 0.090 Total As-Built Modified Loads: 30.18  
 Total Baseline Loads: 37.46 **PASS**

I hereby certify that the plans and specifications covered by this calculation are in compliance with the Florida Energy Code.  
 PREPARED BY: M. GARMAN  
 DATE: 5-30-09

I hereby certify that this building as designed is in compliance with the Florida Energy Code.  
 OWNER/AGENT: [Signature]  
 DATE: 5-30-09

Review of the plans and specifications covered by this calculation indicates compliance with the Florida Energy Code. Before construction is completed this building will be inspected for compliance with Section 553.908 Florida Statutes.  
 BUILDING OFFICIAL: \_\_\_\_\_  
 DATE: \_\_\_\_\_

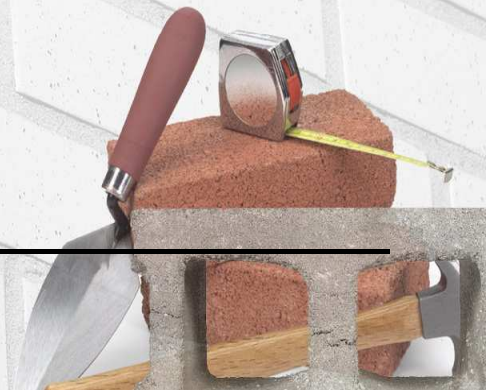
**SEAL OF THE STATE OF FLORIDA**  
 IN GOD WE TRUST

- Compliance requires certification by the air handler unit manufacturer that the air handler enclosure qualifies as certified factory-sealed in accordance with N1110.A.3.



# *Residential Masonry Model*

- Tracking North, Central & South Florida regions (Climatic Zones)
- Concrete Masonry, Wood and Other (Precast, ICF, Log & Misc)
- Market Share by Units and SQ-FT
- Tracking 2<sup>nd</sup> Floor in South Zone



# Masonry Association of Florida, Inc.

## Residential Masonry Climate Zones

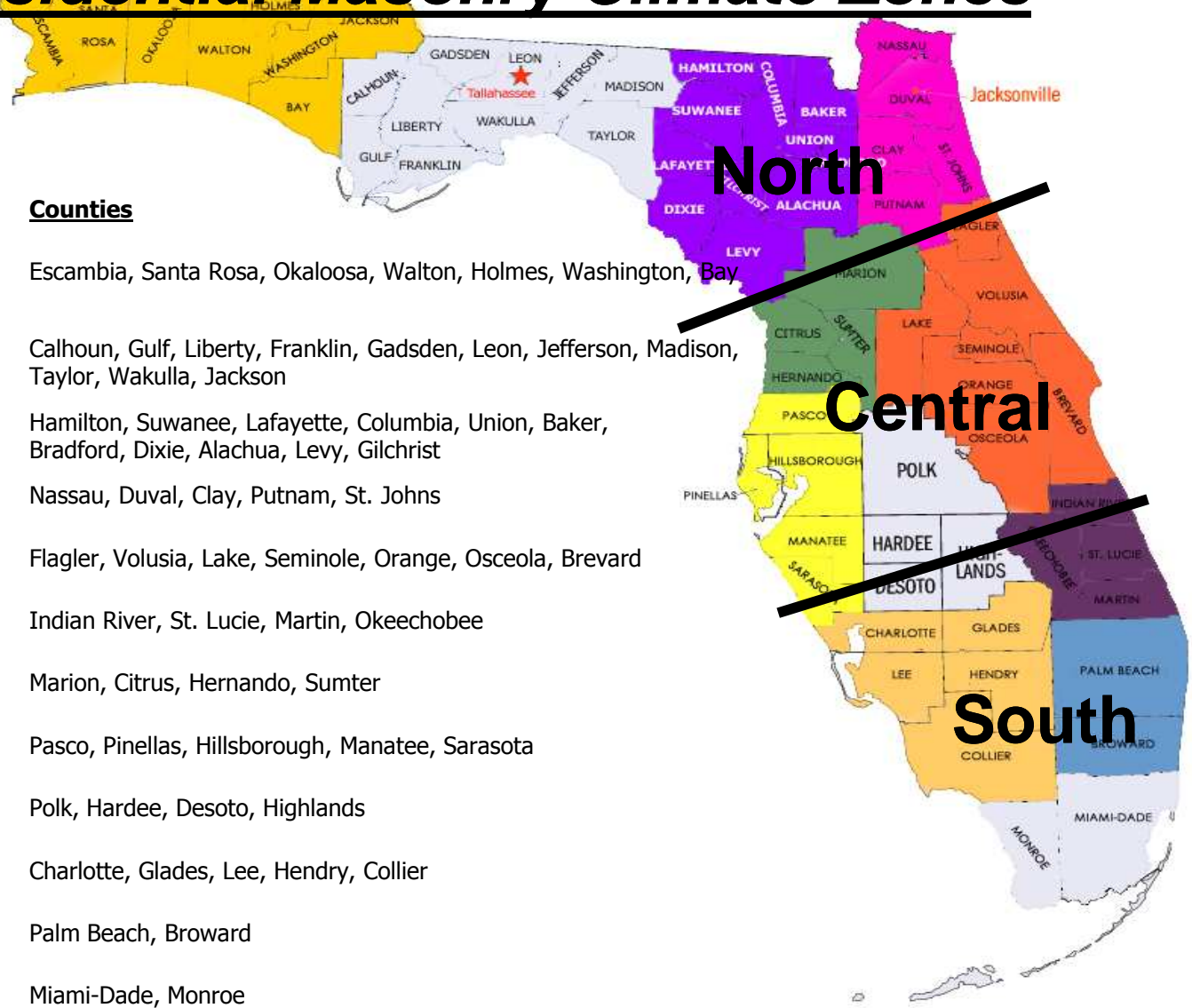


### MAF Chapter

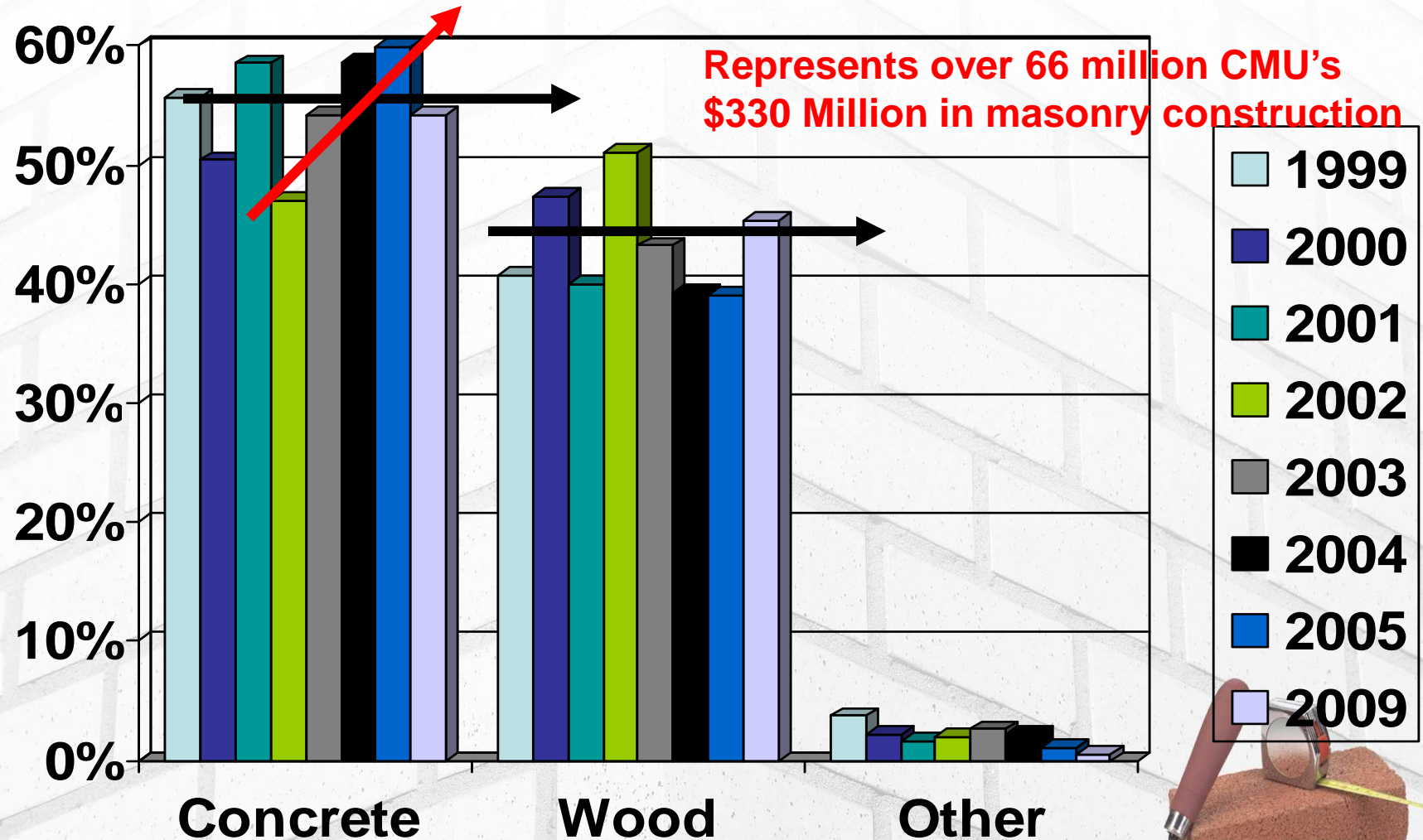
- ◆ **NW Pensacola Chapter**
- ◆ **OPEN Chapter**
- ◆ **NC Chapter**
- ◆ **NE Chapter**
- ◆ **Central Chapter**
- ◆ **Treasure Coast Chapter**
- ◆ **West Central Chapter**
- ◆ **Tampa MCAF Chapter**
- ◆ **OPEN Chapter**
- ◆ **Southwest Chapter**
- ◆ **Southeast Chapter**
- ◆ **Masonry Association of Florida, Inc. OPEN Chapter**

### Counties

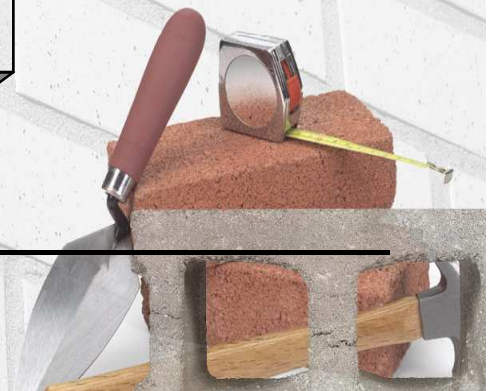
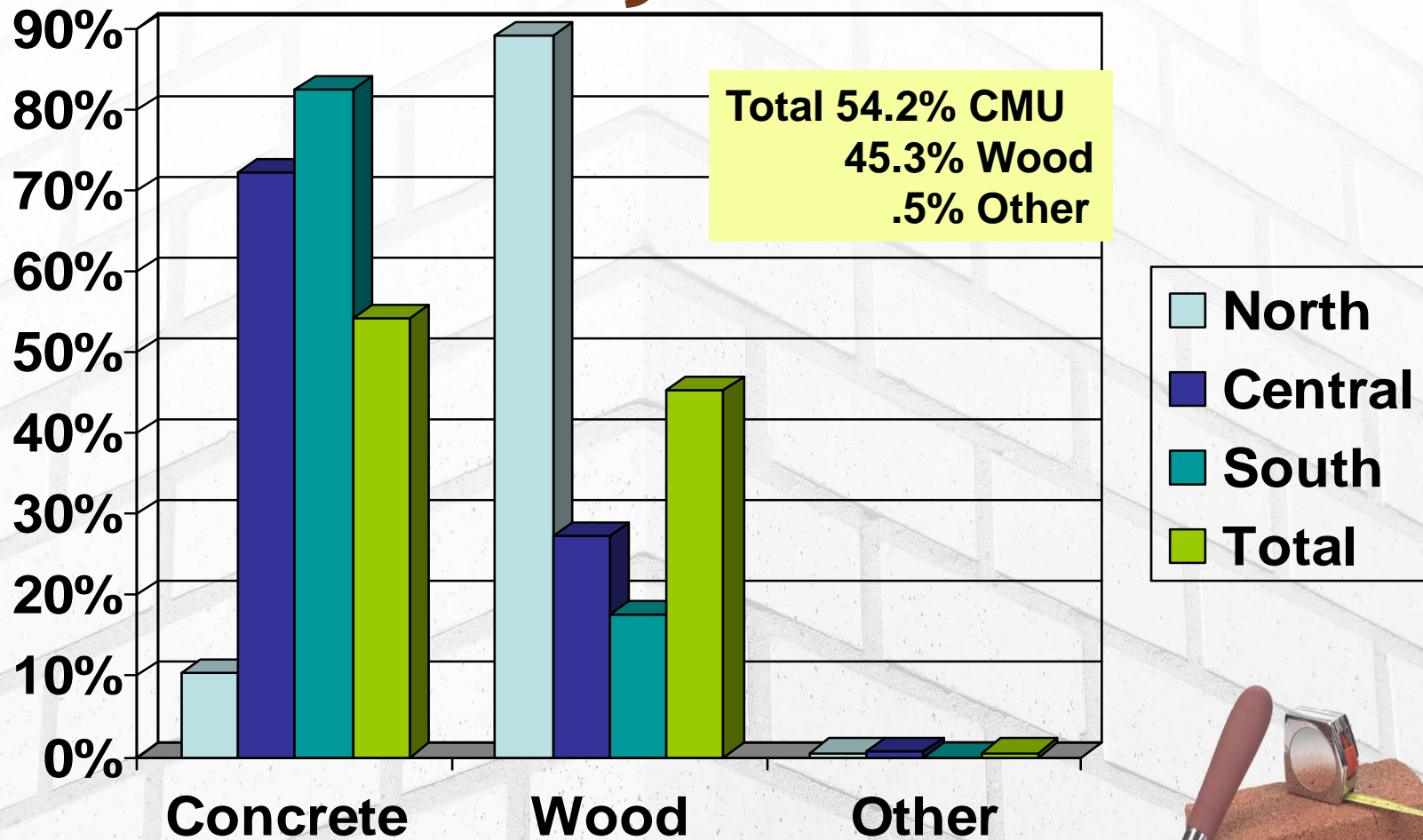
- Escambia, Santa Rosa, Okaloosa, Walton, Holmes, Washington, Bay
- Calhoun, Gulf, Liberty, Franklin, Gadsden, Leon, Jefferson, Madison, Taylor, Wakulla, Jackson
- Hamilton, Suwanee, Lafayette, Columbia, Union, Baker, Bradford, Dixie, Alachua, Levy, Gilchrist
- Nassau, Duval, Clay, Putnam, St. Johns
- Flagler, Volusia, Lake, Seminole, Orange, Osceola, Brevard
- Indian River, St. Lucie, Martin, Okeechobee
- Marion, Citrus, Hernando, Sumter
- Pasco, Pinellas, Hillsborough, Manatee, Sarasota
- Polk, Hardee, Desoto, Highlands
- Charlotte, Glades, Lee, Hendry, Collier
- Palm Beach, Broward
- Miami-Dade, Monroe



# Residential Masonry Market Share Units



# Residential Market Share 2009 Units





# Residential Market Conversion Goals

## (Results in Residential Masonry Market Share Increase)

| Year | Masonry Market Share of All Residential Const (Based on # of Single-Family Residences) | % of Market Share Increase | Additional # of Single-Family Masonry Residences (Based on 100,000 Total Florida Residences Built per Year) | Additional # of CMU (Assumes 2200 CMU/Single-Family Residence) | \$ Value of Increased FL Masonry Business per Year at \$5/CMU | Net \$ Profit to Industry per Year at \$.25/CMU (5% Overall Profit) |
|------|--|----------------------------|---|--|---|---|
| 2009 | 54% (Baseline)   |                            |   |  |   |   |
| 2010 | 57%  | 3%                         | 3% of 100k res = 3,000  | 6.6 MM CMU   | \$33 MM   | \$1.7 MM  |
| 2011 | 60%  | 6%                         | 6% of 100k res = 6,000  | 13.2 MM CMU  | \$66 MM   | \$3.3 MM  |
| 2012 | 63%  | 9%                         | 9% of 100k res = 9,000  | 19.8 MM CMU  | \$99 MM   | \$5 MM  |
| 2013 | 66%  | 12%                        | 12% of 100k res = 12,000  | 26.4 MM CMU  | \$132 MM  | \$6.6 MM  |

\* Home volumes based on 20 year SF average homes built between 1983-2003

# *At Stake for the Masonry Industry*

***\$ 354 Million in Construction and  
\$ 19 Million in Industry Profits  
51.5 million CMU's***

Commercial – 222 Million Construction & 12.5 Million Net Profit

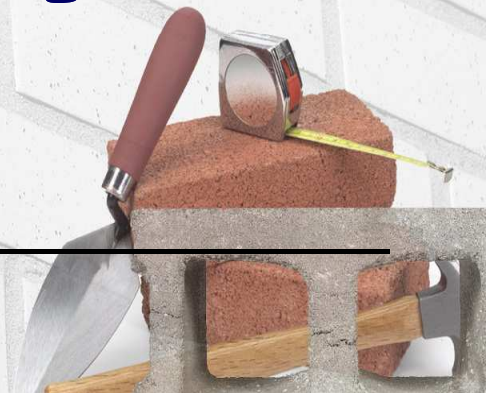
Residential – 132 Million Construction & 6.6 Million in Net Profit



How do we “GAIN” Market  
Share???????

**“Promote”**

**ProMasonry**



# Promotion Model (FC&PA Parking Lot Promo Plan)

## Lessons Learned (2+ years)

- Need all industry to be involved (Army!)
- Need Leads (Association & Regions)
- Target Developers & Architects
- Need to be project specific
- Association is a support to the Army
  - Identify Opportunity
  - Provide technical Back up & support
  - Develop sales & promotion tools
- Need training to call on Dev & Archs
- Need a tracking system to measure results



# Masonry Association of Florida, Inc.

## ProMasonry Committee in Each Chapter



### MAF Chapter

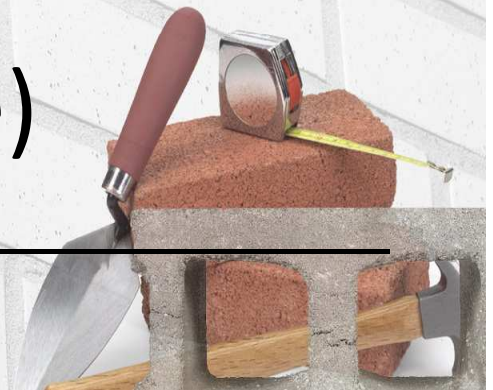
### Counties

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- ◆ **Treasure Coast Chapter** Indian River, St. Lucie, Martin, Okeechobee
- ◆ **West Central Chapter** Marion, Citrus, Hernando, Sumter
- ◆ **Tampa MCAF Chapter** Pasco, Pinellas, Hillsborough, Manatee, Sarasota
- ◆ **OPEN Chapter** Polk, Hardee, Desoto, Highlands
- ◆ **Southwest Chapter** Charlotte, Glades, Lee, Hendry, Collier
- ◆ **Southeast Chapter** Palm Beach, Broward
- ◆ **OPEN Chapter** Miami-Dade, Monroe



# *Masonry Industry's Commercial Lead Tracking (CLT) Program*

1. Chapter Team (Contractor, Producer, Supplier)
2. Projects fed monthly to team
3. Team to qualify projects (Buckets)
4. Team to pursue masonry specifications (Face-to-Face)



# Questions to ask to track projects

- What is the status of the project?
- Has decision been made on structural wall type?
  - If masonry? 100% or 50%?
  - If not when will the decision be made?
- Can we continue to keep in touch with you?
- Is there any information you need?
- Can we come and show you that masonry is:  
Cheaper – Faster - Better



## Project List Report

5/11/2010

| Project ID | Title   | County       | City           | Value        | Record Date | Architect Name              | Architect Phone# | Owner Name                   | Owner Phone #  | Stage Commen ts 1               | Stage Commen ts 2                    | Architect Contact | Owner Contact |
|------------|---|--------------|----------------|--------------|-------------|-----------------------------|------------------|------------------------------|----------------|---------------------------------|--------------------------------------|-------------------|---------------|
| 1001099069 | LARGO INTRACOASTAL MARINA                         | Pinellas     | Largo          | \$10,000,000 | 08/13/2009  | FISHER KOPPENHAFFER PA      | (904) 367-0077   | WATERMARK DEVELOPMENT GROUP  | (727) 532-4420 | Masterplanning Complete         | Project On Hold Pending Owner Review | Papke, Steven     |               |
| 1001172293 | MAIN STREET AT LAKEWOOD RANCH PHASE 2             | Manatee      | Lakewood Ranch | \$5,000,000  | 01/07/2010  |                             |                  | HOMES BY TOWNE               | (941) 907-9799 | Masterplanning Complete         | On Hold Pending Financing            |                   | Wilder, Jim   |
| 1001172298 | MAIN STREET AT LAKEWOOD RANCH PHASE 3             | Manatee      | Lakewood Ranch | \$5,000,000  | 01/07/2010  |                             |                  | HOMES BY TOWNE               | (941) 907-9799 | Masterplanning Complete         | On Hold Pending Financing            |                   | Wilder, Jim   |
| 1001172299 | MAIN STREET AT LAKEWOOD RANCH PHASE 4             | Manatee      | Lakewood Ranch | \$5,000,000  | 01/08/2010  |                             |                  | HOMES BY TOWNE               | (941) 907-9799 | Masterplanning Complete         | On Hold Pending Financing            |                   | Wilder, Jim   |
| 1000534259 | PINELLAS COUNTY JAIL                              | Pinellas     | Clearwater     | \$60,000,000 | 04/10/2008  | RANON & PARTNERS INC        | (813) 253-3485   | PINELLAS CO SHERIFF'S OFFICE | (727) 582-6200 | Masterplanning Complete         | On Hold Pending Owner Review         |                   |               |
| 1001223436 | SARASOTA SCHOOL OF ARTS & SCIENCES CHARTER SCHOOL | Sarasota     | Sarasota       | \$7,000,000  | 04/13/2010  | GUSTAVO CARBONELL           | (954) 462-6585   |                              |                | Masterplanning In Progress      | Subbid Schedule Not Set              | Carbonne II, Gus  |               |
| 1001224367 | SOUTH TAMPA HEALTH & REHABILITATION               | Hillsborough | Tampa          | \$8,000,000  | 04/15/2010  |                             |                  |                              |                | Masterplanning In Progress      | Subbid Schedule Not Set              |                   |               |
| 1000933829 | SUN & FUN RESORT FITNESS CENTER BLDG              | Sarasota     | Sarasota       | \$5,000,000  | 10/23/2008  | CARLSON STUDIO ARCHITECTURE | (941) 362-4312   | SUN & FUN RESORT             | (941) 379-5795 | Conceptual Drawings In Progress | Subbid Schedule Not Set              | Carson, Michael   |               |



## Project List Report

8/2/2010

| Project ID | Title                                       | County    | City           | Value       | Record Date | Architect Name                     | Architect Phone # | Owner Name                      | Owner Phone #  | Stage Comments 1           | Stage Comments 2                   | Architect Contact | Owner Contact    |
|------------|---|-----------|----------------|-------------|-------------|------------------------------------|-------------------|---------------------------------|----------------|----------------------------|------------------------------------|-------------------|------------------|
| 1001279292 | CHARLOTTE COMMONS LOT 15                    | Charlotte | Port Charlotte | \$2,000,000 | 07/13/2010  |                                    |                   | PRIMERICA DEVELOPMENT           | (813) 933-0629 | Masterplanning Complete    | On Hold Pending Leasing            |                   | Robinson, Adam   |
| 1001279037 | CHILDRENS HOSPITAL OF SOUTHWEST FLORIDA     | Lee       | Fort Myers     | \$4,000,000 | 07/13/2010  | HKS INC                            | (407) 648-9956    | LEE MEMORIAL HEALTH SYSTEM      | (239) 332-1111 | Masterplanning In Progress | Bid Schedule Not Set               | Cox, Gary         | Krieger, Karen   |
| 1001277736 | DOCKS ON FIFTH PHASE 1 DRY STORAGE BUILDING | Collier   | Naples         | \$3,000,000 | 07/09/2010  | GORA MCGAHEY ASSOC IN ARCHITECTURE | (239) 275-0225    | GREGG DEVELOPMENT OF NAPLES INC | (239) 348-7200 | Working Drawings Complete  | On Hold Pending Leasing            |                   |                  |
| 1001273048 | FORT MYERS ASSISTED LIVING FACILITY         | Lee       | Fort Myers     | \$6,700,000 | 07/01/2010  | TYSON AND BILLY ARCHITECTS         | (239) 542-4874    | CUSTOM CONTRACTING COMPANY      | (941) 533-7748 | Masterplanning In Progress | Subbid Date To Be Set Late 2010    | Tyson, Bruce      | Grafkows ki, Ron |
| 1001277137 | NAPLES AIRPORT RECYCLING CENTER BALER       | Collier   | Naples         | \$2,600,000 | 07/09/2010  |                                    |                   | COLLIER COUNTY PURCHASING       | (239) 252-8407 | BIDS: 08/11/2010, 02:30 PM | Changed From: 07/23/2010, 02:30 PM |                   |                  |
| 1001289983 | PUNTA GORDA OFFICE BUILDING 20              | Charlotte | Punta Gorda    | \$3,000,000 | 07/30/2010  |                                    |                   | PRIMERICA DEVELOPMENT           | (813) 933-0629 | Masterplanning Complete    | On Hold Pending Leasing            |                   | Robinson, Adam   |
| 1001289985 | PUNTA GORDA OFFICE BUILDING 21              | Charlotte | Punta Gorda    | \$3,000,000 | 07/30/2010  |                                    |                   | PRIMERICA DEVELOPMENT           | (813) 933-0629 | Masterplanning Complete    | On Hold Pending Leasing            |                   | Robinson, Adam   |
| 1001285693 | PUNTA GORDA OUTPARCEL 10                    | Charlotte | Punta Gorda    | \$4,000,000 | 07/23/2010  |                                    |                   | PRIMERICA DEVELOPMENT           | (813) 933-0629 | Masterplanning Complete    | On Hold Pending Leasing            |                   | Robinson, Adam   |
| 1001285699 | PUNTA GORDA OUTPARCEL 11                    | Charlotte | Port Charlotte | \$4,000,000 | 07/23/2010  |                                    |                   | PRIMERICA DEVELOPMENT           | (813) 933-0629 | Masterplanning Complete    | On Hold Pending Leasing            |                   | Robinson, Adam   |
| 1001277149 | WINN DIXIE STORE                            | Lee       | Cape Coral     | \$3,763,000 | 07/09/2010  |                                    |                   | WINN-DIXIE STORES INC           | (904) 783-5000 | Working Drawings Complete  | Subbid Schedule Not Set            |                   |                  |

# Project Bidding

## Material Selection Period

Contractor Chosen

Project Completion

Permitting and Construction

Working Drawings

Design Development

Schematics

Conceptual Drawings

Master Planning

Arch Selection Underway

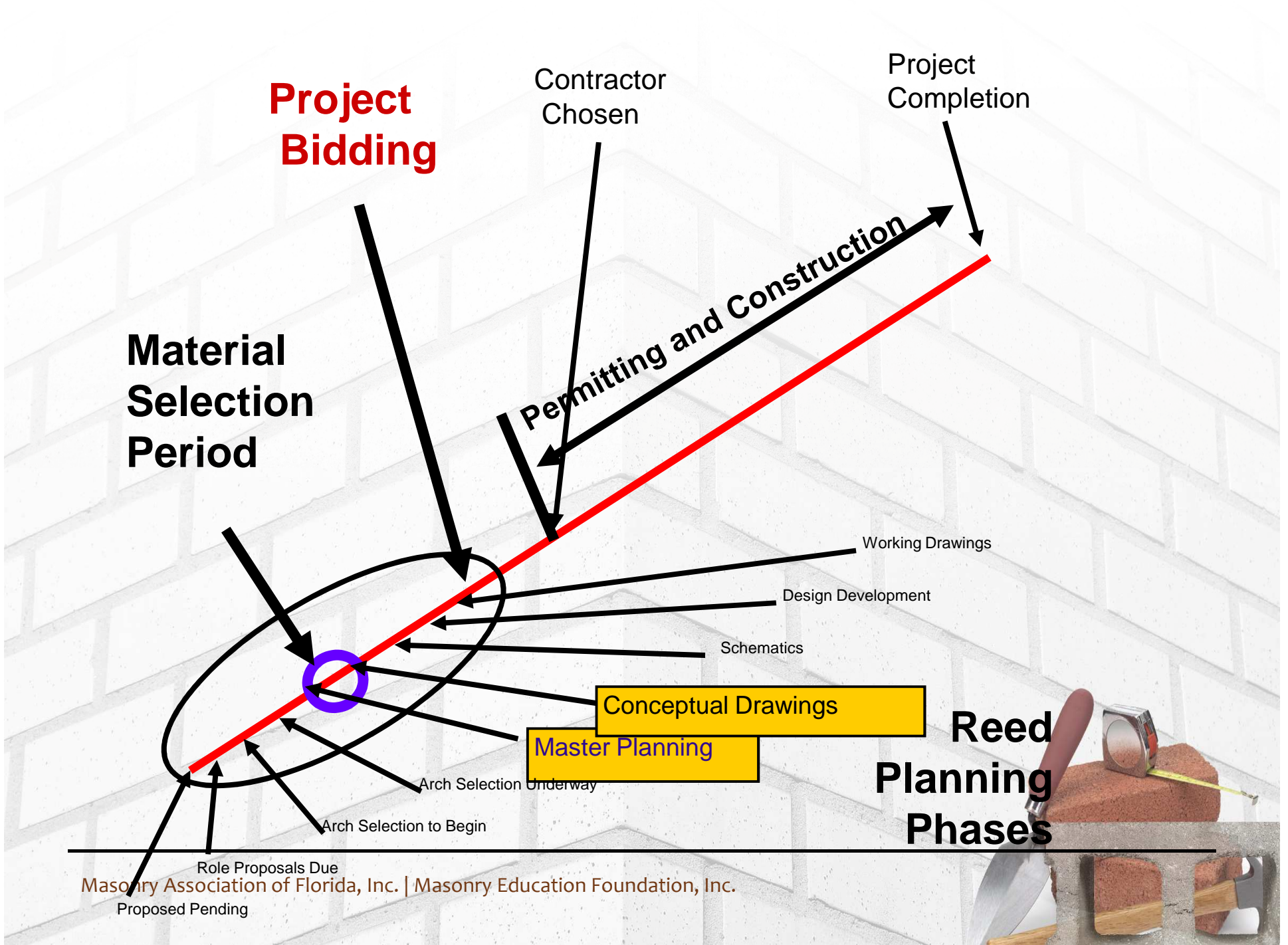
Arch Selection to Begin

Role Proposals Due

Masonry Association of Florida, Inc. | Masonry Education Foundation, Inc.

Proposed Pending

## Reed Planning Phases

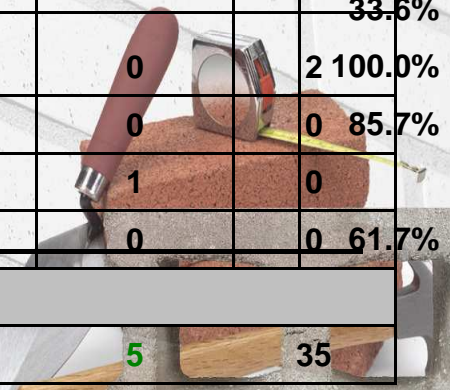


# CLT Performance (July 2010)

## Pro Masonry Commercial Lead Tracking Sub-Committees

| 2010 YTD                                 | Total # Projects Assigned from Reed | Total # Projects Called & Qualified | # Projects Qualified to Buckets |    |    |     | Bucket #3 Meetings | Number of Conversions | Non-Bucket Meetings |        |
|--|-------------------------------------|-------------------------------------|---------------------------------|----|----|-----|--------------------|-----------------------|---------------------|--------|
|  |                                     |                                     | #1                              | #2 | #3 | #4  |                    |                       |                     |        |
|  |                                     |                                     |                                 |    |    |     |                    |                       |                     | 95.1%  |
|  |                                     |                                     |                                 |    |    |     |                    |                       |                     | 84.6%  |
| Tampa                                    | 61                                  | 58                                  | 14                              | 12 | 4  | 31  | 11                 | 2                     | 9                   | 69.8%  |
| Polk                                     | 13                                  | 11                                  | 3                               | 4  | 1  | 3   | 0                  | 0                     | 1                   | 100.0% |
| Northeast                                | 53                                  | 37                                  | 8                               | 2  | 0  | 27  | 0                  | 0                     | 5                   | 33.3%  |
| North Central                            | 39                                  | 39                                  | 4                               | 4  | 16 | 15  | 5                  | 0                     | 3                   | 68.8%  |
| Tallahassee                              | 27                                  | 9                                   | 3                               | 0  | 1  | 5   | 0                  | 0                     | 0                   | 46.4%  |
| Southwest                                | 48                                  | 33                                  | 3                               | 0  | 12 | 6   | 2                  | 0                     | 2                   | 81.1%  |
| Southeast                                | 112                                 | 52                                  | 16                              | 3  | 14 | 19  | 9                  | 2                     | 13                  | 33.6%  |
| Treasure Coast                           | 37                                  | 30                                  | 9                               | 2  | 1  | 18  | 0                  | 0                     | 2                   | 100.0% |
| Orlando                                  | 122                                 | 41                                  | 8                               | 4  | 10 | 19  | 0                  | 0                     | 0                   | 85.7%  |
| Northwest                                | 2                                   | 2                                   | 0                               | 2  | 0  | 1   | 1                  | 1                     | 0                   |        |
| Ocala                                    | 21                                  | 18                                  | 3                               | 0  | 0  | 15  | 0                  | 0                     | 0                   | 61.7%  |
| Bucket #1 - Likely to be or is Masonry   |                                     |                                     | 3                               | 0  | 0  | 15  | 0                  | 0                     | 0                   |        |
| Bucket #2 - Product other than Masonry   |                                     |                                     |                                 |    |    |     |                    |                       |                     |        |
| Bucket #3 - No Decision on structural w: |                                     |                                     |                                 |    |    |     |                    |                       |                     |        |
| Bucket #4 - Project dead or on hold      |                                     |                                     | 71                              | 33 | 59 | 159 | 28                 | 5                     | 35                  |        |
| Total Ad                                 |                                     |                                     |                                 |    |    |     |                    |                       |                     |        |

Two Objectives:  
 #1) Quality 100%  
 #2) Secure face



# ***Masonry Association of Florida***



***“The Core Purpose of the MAF,  
the primary reason for it’s  
existence,  
is to increase Market Share of  
masonry systems in Florida.”***

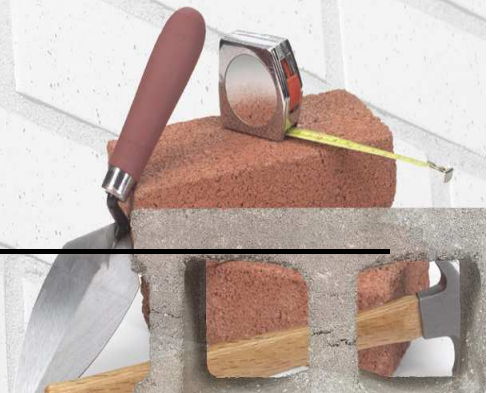


# Wrap-Up

**“Coming together is a beginning**

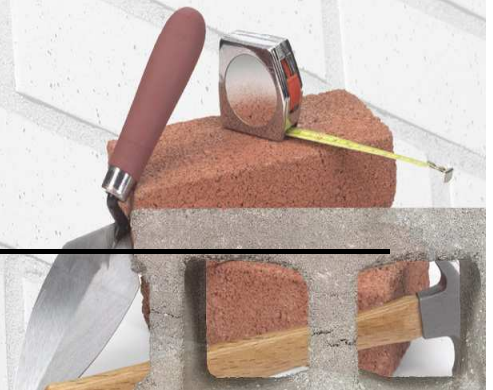
**~ Keeping together is progress**

**~ Working together is success”**



# Next Steps

- Establish “Residential” ProMasonry Teams
- Outsource “Lead Tracking” Qualification
- Pursue State and Support National Check off
- Execute New Mission
  - Recruit More Contractor Members (Contractor Certification)
  - Strengthen Local Chapters



# *Thank You!*

Good Luck Arizona with your  
Associations and Promoting Masonry

## **Masonry Association of Florida, Inc.**

398 Camino Gardens Blvd.  
Suite 108  
Boca Raton, Florida 33432

**[www.floridaMasonry.org](http://www.floridaMasonry.org)**

