



FLORIDA
**MASONRY APPRENTICE
& EDUCATIONAL
FOUNDATION**

Proposal for Growth & Expansion of the
Masonry Association of Florida &
The Florida Masonry Apprentice & Educational Foundation, Inc.

Submitted January 12th, 2017



Overview

The MAF and MAEF have established a distinct brand and reputation both individually and in concert with one another. Both are recognized statewide and nationally for the unique roles they play in the masonry industry. This recognition opens many doors and opportunities for us and should not be taken for granted. After a tumultuous year which saw the departure of the long standing Executive Director and with him most of the funding, both organizations have rallied to rebuild themselves.

The Florida Concrete Masonry Education Council, established by the Governor of Florida, to distribute funds from the penny per block initiative, issued its Invitation to Negotiate in December 2015. The initiative allows for the voluntarily collection of one penny per block sale from mason contractors across the State. This money, minus operating costs, is to be distributed to interested parties that fulfill the requirements of the FCMEC. Florida Statute 446.53 describes the intent, qualifications, and purpose required, by which such parties can request grant funds. With the current national legislation to make this initiative mandatory, all eyes watch Florida to see how their program develops.

(Note: U.S. Congress has granted approval of H.R. 985. Companion bill S.1524 is currently awaiting approval in the U.S. Senate)

MAF Organizational Chart:

Leadership (Executive Director)

The MAF needs an Executive Director. The MAF functions quite well with the limited but highly efficient staff currently in place but needs organizational oversight and expanded marketing campaigns. The ideal individual possesses masonry industry experience and has a positive reputation among its industry leaders. I recommend Jerry Painter for this role. He is well known and respected throughout the State. He understands both the contractor needs as well as the producers who support the industry, and could successfully grow the membership base. While this position could be part-time there is a current need to actively market the MAF to a wider contractor base and secure more members statewide. More members provide a stronger base from which to launch industry and legislative recommendations.

Engineer (Consultant)

Having an engineer on staff or through a consultative arrangement is essential to producing the kinds of products our industry needs. The expertise and technical knowledge add credibility to all these products and ensure continual growth in attracting new membership and industry partnerships.

Retaining Don Beers in this role is vital. He is well established in the architectural and engineering community, and the masonry industry as a leading expert. His years of experience and hundreds of seminar presentations have demonstrated his advanced knowledge of structural design. His proven success and well deserved expert status make him the go-to source for structural design issues.

Marketing Director

All that the MAF does is marketing in nature. Whether through publications, seminars, conferences, and local and statewide events, the MAF is selling the idea and strength of masonry.

Retain Deb Bartolucci in this position. Deb has proven that she can maximize the ROI on marketing, within whatever budget she is given, and is the ideal candidate for this position. She currently runs the marketing of a variety of programs for the MAF and the MAEF. Her knowledge of internet based training, web design, and social media, to name just a few of her talents, provides for a broader range of marketing coverage at a much more reasonable cost.

Administrative Assistant

While one of the goals for 2017 is to maximize efficiency through the use of the AMS system, there are some activities that require support staff.

Retaining Aaron Bettinger to continue in this position allows him to perform data entry for the ongoing programs, prepare meeting minutes, to make copies, deliver end products and mail processing. This is a part-time position with no more than 20-30 hours per week. As the MAF takes on additional projects and events it may become necessary to extend this role to a full-time position.

Legal/Accounting (Consultant)

This function, while critical to the financial well-being of the MAF, does not need to be a full-time position. Furthermore, it is recommended that the position be filled by outside independent professionals on a consultative basis.

I recommend Maria C. Ferrao, P.A., a lawyer who specializes in taxation and non-profits. Ms. Ferrao teams with a CPA to offer a full package of legal and accounting services at a flat monthly rate.

This function will be shared between the MAF and MAEF, as separate entities, and maintaining each organizations individual and distinct differences, while recognizing the tax implications and consequences of each organization. Based on legal recommendations the team will implement best accounting practices to efficiently handle the needs of the organizations.

Receptionist

This position will be provided as part of the services offered by an all-inclusive Executive Center.

Scope of Services and Providers for the MAF:

1. Enter into an agreement with an Executive Center located in a central location to provide office space, storage, security, conference room usage as needed, a receptionist to answer all calls in a timely manner and direct clients and visitors as needed. Current upscale rental arrangements are available in Orlando,

Naples, and Ft. Lauderdale for \$7,000 - \$8,000 annually that would provide the services listed above.

2. Maria C. Ferrao, P.A., is willing to provide the services listed below to the MAF for 2017 at the rate of \$30,000 annually. The following services would be provided: Annual reports, renewal of all licenses, legal oversight of MAF practices and policies, bookkeeping services, AR/AP monthly reconciliations and monthly/annual financial statements, including YTD and Budget v Actual, and P & L Balance Sheets.
3. The Association Management Software system, currently included in the MAF 2017 budget at \$8,000, provides a seamless array of technology based services. Some of the highlights are: automatic billing of dues, reminders, credit card processing of dues, events, seminars and conferences, and the creation and maintenance of a member and contractor data-base. Also provided by the AMS system: Constant Contacts, web-hosting and domain names, and shareable calendars. This integrated system will eliminate many of the tedious and time consuming activities that warrant a larger staff. The software also allows for the creation and implementation of innovative services and products our members need.
4. Deb Bartolucci and Aaron Bettinger would retain their current responsibilities and rate of pay.
5. Don Beers would retain his current responsibilities and consultative arrangement.

MAEF Organizational Chart:

Leadership (Executive Director)

The MAEF needs an Executive Director. While the MAEF staff function independently there does need to be a shared vision and goal for the Foundation. Additionally, oversight of the available funding sources and financial governance is critical for the continued success of the MAEF. The ideal person possesses a working knowledge of the masonry industry and apprenticeship programs as well as having a strong financial background and analytical skill set. Fund raising at the Foundation level is needed to provide more capital to grow innovative and necessary programs to support the masonry industry.

Current staff may be able to transition into this position.

Director of Apprenticeship

The apprenticeship programs continue to be riddled with multiple contract arrangements and fees for service. There is limited consistency from region to region. This needs to change. Standardization of the services we provide to the Chapters, LEA's and apprentice programs need to be implemented now.

Current staff may be able to transition into this position.

Marketing

The MAEF does not need nor have the funds for a full-time marketing professional. They do, however, have a need for marketing services. The internet is a very useful and inexpensive way to market for individuals looking for career opportunities as well as to educate the public on the values of apprenticeship as an

alternative to the traditional college pathway to a career.

Retain Deb Bartolucci on a part-time basis to provide market exposure via social media and other internet based products, production of printed media, and enhancements to the MAEF website. Deb currently works approximately 10 hours per week for the MAEF. My recommendation is to increase her weekly hours to 15-20 hours per week for the 1st and 2nd quarters of 2017 to implement the MAEF marketing campaign. After the successful marketing campaign launch there should be an analysis and review by the Executive Director to determine what activities and hours per week will be required to maintain the campaign.

Administrative Assistant

The job of supporting the NCCER relationship will require at least a part-time employee to manage the program record keeping. It is recommended that a careful analysis be conducted to determine whether this relationship at the current rate of payment for services covers the expense of providing those services. My recommendation is that the Director of Apprenticeship assumes this responsibility to evaluate the NCCER relationship and makes the final decision to add this staff position.

Legal/Accounting

This function while critical to the financial well-being of the MAEF does not need to be a full-time position. Furthermore, it is recommended that the position be filled by outside independent professionals on a consultative basis.

I recommend Maria C. Ferrao, P.A., a lawyer who specializes in taxation and non-profits. Ms. Ferrao teams with a CPA to offer a full package of legal and accounting services at a flat monthly rate.

This function will be shared between the MAF and MAEF, as separate entities, and maintaining each organizations individual and distinct differences, while recognizing the tax implications and consequences of each organization. Based on legal recommendations the team will implement best accounting practices to efficiently handle the needs of the organizations.

Receptionist

This position will be provided as part of the services offered by an all-inclusive Executive Center.

Apprentice Coordinators

Retain the three apprentice coordinators to represent the following areas:

North Region – AL Herndon

West Region -- Donna Hinson

East Region -- Julio Vazquez

Central Region – add another apprentice coordinator

(Central is still loosely connected but under the complete control of Mid Florida Tech. This represents an opportunity for expansion and to take back control of this Region.)

NCCER (Consultant)

Retain Dennis Neal If the analysis of the current NCCER income and expenses to the MAEF warrants its continuation.

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2. Maria C. Ferrao, P.A., is willing to provide the services listed below to the MAEF for 2017 at the rate of \$30,000 annually. The following services would be provided: Annual reports, renewal of all licenses, legal oversight of MAEF practices and policies, bookkeeping services, AR/AP monthly reconciliations and monthly/annual financial statements, including YTD and Budget v Actual, and P & L Balance Sheets.
3. The Association Management Software system, can be purchased for the MAEF for the cost of under \$3,000 annually and would provide the same array of technology based services. Some of the highlights are: automatic billing of fees, reminders, credit card processing of fees, events, seminars and conferences, and the creation and maintenance of a member and contractor data-base. Also provided by the AMS system: Constant Contacts, web-hosting and domain names, and shareable calendars. This integrated system will eliminate many of the tedious, time consuming activities that warrant a larger staff. This allows time to create and implement innovative services and products our members need.
4. All current staff would retain their current responsibilities and rate of pay.
5. All consultants would retain their current responsibilities and rate of pay.