State of Construction
ICR Event Series
Thank you to our Gold Sponsor
Thank you to our Gold Sponsor

WILHELM CONSTRUCTION
Thank you to our Gold Sponsor

Turner
Thank you to our Gold Sponsor

Messer

We Are Building.
Thank you to our Gold Sponsor

BULLEY & ANDREWS
General Contractors Since 1891
Thank you to our Gold Sponsor
Thank you to our Silver Sponsors

MSKTD & Associates
Thank you to our Silver Sponsors
Thank you to our Silver Sponsors
Thank you to our Silver Sponsors
Thank you to our Silver Sponsors
Thank you to our Silver Sponsors
Thank you to our Silver Sponsors
Thank you to our Silver Sponsors
Thank you to our Silver Sponsors
Thank you to our Silver Sponsor

AGC OF INDIANA
Quality People. Quality Projects.
Thank you to our Silver Sponsors
Thank you to our Silver Sponsors
Education Committee Members

Brent Crum, Chair  
*MSKTD*

Adam Campagna  
Shiel Sexton

Nate Lelle  
Meyer Najem

Stu Flannery  
_Eli Lilly_

Rosie Foulke  
_Browning Day Mullins Dierdorf_

David Roth  
_Tonn and Blank_

Audra Blasdel  
_Blasdel Solutions_

Julia Saltsgaver  
_Quality Connection_
Space can be an asset, a liability, a resource, a responsibility, or a tool for owners to utilize in their day to day missions. This educational program will feature panelists from Eli Lilly, the City of Fishers, IU Health, and Gershman Partners.

Join Us March 8th at 7:30 AM
1201 Central Avenue, Indianapolis, IN 46202

Register Today: indianaconstruction.org
U.S. Construction Forecast

* FMI Forecast Q3 2017
Consumer Confidence Remains Below Prior Cycle Highs

Conference Board Consumer Confidence
As of January 31, 2017

When consumer confidence rolls over, recession is imminent; likely not there yet.
Unemployment Rate

Source: U.S. Department of Labor, AGC of America
Architecture Billing Index (ABI)

Source: AIA
FMI’s Nonresidential Construction Index

NRCl Scores Since Inception—Q4 2010 to Q1 2018
(Scores above 50 indicate expansion, below 50 contraction.)
**U.S. Markets Construction Overview**

**Construction Spending Put in Place 2017 (USD Billions)**

- **Residential Improvements**
- **Multifamily**
- **Commercial**
- **Office**
- **Power**
- **Educational**
- **Health Care**
- **Highway and Street**
- **Transportation**
- **Lodging**
- **Communication**
- **Religious**
- **Water Supply**
- **Manufacturing**
- **Amusement and Recreation**
- **C&D & S & WD**

*Improvements include additions, alterations and major replacements. It does not include maintenance and repairs.*
Q4 2017 Indiana Markets Construction Overview

Compound Annual Growth Rate (2016 through 2021)

Construction Spending Put in Place 2017 (USD Billions)

*Improvements include additions, alterations and major replacements. It does not include maintenance and repairs.
Source: Building permits, Construction Put in Place and trade sources.
This report is based on multiple sources, prepared and believed accurate by FMI, but accuracy is not guaranteed by FMI nor by its employees.
## Indiana Construction Put In Place

**Millions of current dollars, Q4 2017**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Family</td>
<td>1,989</td>
<td>2,413</td>
<td>2,584</td>
<td>2,763</td>
<td>3,071</td>
<td>3,318</td>
<td>3,520</td>
</tr>
<tr>
<td>Multi Family</td>
<td>402</td>
<td>417</td>
<td>374</td>
<td>331</td>
<td>371</td>
<td>410</td>
<td>430</td>
</tr>
<tr>
<td>Improvements*</td>
<td>1,705</td>
<td>1,752</td>
<td>1,787</td>
<td>1,804</td>
<td>1,858</td>
<td>1,895</td>
<td>1,937</td>
</tr>
<tr>
<td><strong>Total Residential</strong></td>
<td>4,095</td>
<td>4,581</td>
<td>4,745</td>
<td>4,898</td>
<td>5,301</td>
<td>5,624</td>
<td>5,887</td>
</tr>
<tr>
<td><strong>Percent Change YoY</strong></td>
<td>-5%</td>
<td>12%</td>
<td>4%</td>
<td>3%</td>
<td>8%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Lodging</td>
<td>491</td>
<td>591</td>
<td>620</td>
<td>665</td>
<td>749</td>
<td>796</td>
<td>735</td>
</tr>
<tr>
<td>Office</td>
<td>1,164</td>
<td>1,287</td>
<td>1,320</td>
<td>1,390</td>
<td>1,532</td>
<td>1,653</td>
<td>1,576</td>
</tr>
<tr>
<td>Commercial</td>
<td>1,572</td>
<td>1,709</td>
<td>1,786</td>
<td>1,891</td>
<td>2,030</td>
<td>2,140</td>
<td>2,191</td>
</tr>
<tr>
<td>Health Care</td>
<td>932</td>
<td>921</td>
<td>943</td>
<td>1,032</td>
<td>1,183</td>
<td>1,076</td>
<td>1,008</td>
</tr>
<tr>
<td>Educational</td>
<td>1,980</td>
<td>2,142</td>
<td>2,109</td>
<td>1,999</td>
<td>2,056</td>
<td>2,166</td>
<td>2,225</td>
</tr>
<tr>
<td>Religious</td>
<td>79</td>
<td>75</td>
<td>68</td>
<td>66</td>
<td>67</td>
<td>68</td>
<td>69</td>
</tr>
<tr>
<td>Public Safety</td>
<td>207</td>
<td>191</td>
<td>189</td>
<td>284</td>
<td>239</td>
<td>191</td>
<td>180</td>
</tr>
<tr>
<td>Amusement and Recreation</td>
<td>482</td>
<td>509</td>
<td>523</td>
<td>514</td>
<td>486</td>
<td>483</td>
<td>490</td>
</tr>
<tr>
<td>Transportation</td>
<td>988</td>
<td>950</td>
<td>967</td>
<td>997</td>
<td>1,041</td>
<td>1,101</td>
<td>1,149</td>
</tr>
<tr>
<td>Communication</td>
<td>417</td>
<td>427</td>
<td>436</td>
<td>449</td>
<td>464</td>
<td>477</td>
<td>487</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>1,685</td>
<td>1,950</td>
<td>2,392</td>
<td>3,200</td>
<td>3,748</td>
<td>3,669</td>
<td>3,160</td>
</tr>
<tr>
<td><strong>Total Nonresidential Buildings</strong></td>
<td>9,996</td>
<td>10,752</td>
<td>11,354</td>
<td>12,488</td>
<td>13,594</td>
<td>13,821</td>
<td>13,270</td>
</tr>
<tr>
<td><strong>Percent Change YoY</strong></td>
<td>15%</td>
<td>8%</td>
<td>6%</td>
<td>10%</td>
<td>9%</td>
<td>2%</td>
<td>-4%</td>
</tr>
<tr>
<td>Power</td>
<td>1,754</td>
<td>1,703</td>
<td>1,969</td>
<td>2,185</td>
<td>2,338</td>
<td>2,461</td>
<td>2,381</td>
</tr>
<tr>
<td>Highway and Street</td>
<td>1,761</td>
<td>1,800</td>
<td>1,822</td>
<td>1,843</td>
<td>1,862</td>
<td>1,962</td>
<td>2,105</td>
</tr>
<tr>
<td>Sewage and Waste Disposal</td>
<td>565</td>
<td>539</td>
<td>507</td>
<td>493</td>
<td>500</td>
<td>523</td>
<td>531</td>
</tr>
<tr>
<td>Water Supply</td>
<td>330</td>
<td>318</td>
<td>301</td>
<td>294</td>
<td>301</td>
<td>314</td>
<td>331</td>
</tr>
<tr>
<td>Conservation and Development</td>
<td>163</td>
<td>169</td>
<td>181</td>
<td>194</td>
<td>205</td>
<td>219</td>
<td>226</td>
</tr>
<tr>
<td><strong>Total Nonbuilding Structures</strong></td>
<td>4,572</td>
<td>4,530</td>
<td>4,781</td>
<td>5,009</td>
<td>5,205</td>
<td>5,478</td>
<td>5,573</td>
</tr>
<tr>
<td><strong>Percent Change YoY</strong></td>
<td>-9%</td>
<td>-1%</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Total Put in Place</strong></td>
<td>$18,664</td>
<td>$19,864</td>
<td>$20,880</td>
<td>$22,395</td>
<td>$24,100</td>
<td>$24,923</td>
<td>$24,730</td>
</tr>
<tr>
<td><strong>Percent Change YoY</strong></td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
<td>8%</td>
<td>3%</td>
<td>-1%</td>
</tr>
</tbody>
</table>

*Improvements include additions, alterations and major replacements. It does not include maintenance and repairs.

Source: Building permits, Construction Put in Place and trade sources.
This report is based on multiple sources, prepared and believed accurate by FMI, but accuracy is not guaranteed by FMI nor by its employees.
Employment Growth – Share of US Workers

<table>
<thead>
<tr>
<th>Year</th>
<th>Low Skill</th>
<th>Medium Skill</th>
<th>High Skill</th>
</tr>
</thead>
<tbody>
<tr>
<td>1979</td>
<td>13.7%</td>
<td>61.1%</td>
<td>25.2%</td>
</tr>
<tr>
<td>2016</td>
<td>18.2%</td>
<td>43.2%</td>
<td>38.6%</td>
</tr>
</tbody>
</table>
Global Data Growth Rising Fast = +50% CAGR since 2010...
Data Infrastructure Costs Falling Fast = -20% CAGR
### Venture capital invests almost $1 billion in construction tech

**Project & Task Management/Collaboration**

- Procore
- NOTE Vault
- CONSTRUCT
- InfoTech
- builderfrez
- thinkproject!
- Fieldly
- PlanGrid
- Sub
- Bouw
- GenieBelt
- buildup

### Robotics

- Skycatch
- AirZaar
- Propeller
- Endless Robotics
- DroneDeploy
- Airware
- Iris

### Design

- OnTarget
- Onshape
- GRAITEC
- revizto
- SMART BIM Technologies

### Building/Project Information

- NEWFORMA
- VIMtrek

### Data & Analytics

- UPTAKE
- basestone
- RHUMBIX
- VERNIX LABS

### Inventory & Supply Chain

- Kytten
- VILOC

### Financial Management

- JOIST
- BuildPay

### Equipment Share

- Equipcom
- Techinio
- getable
### Disruptors are Everywhere

#### Construction Projects
- Shopping Centers / Strip Malls
- Single-family Homes
- Automobile Dealerships
- Bank Branch Offices
- University Campuses
- Healthcare (Hospitals)
- Office Buildings
- Restaurants
- Cinemas / Theaters
- Prisons
- Hotels
- Grocery Chains

#### Today's Trending Technologies
- Online Retail / Amazon Prime
- Multi-Family Home / Rentals
- Autonomous Vehicles / Uber
- ING / PayPal / Venmo / BitCoin
- E-Learning / Professional Dev.
- Livehealthonline / Fitbit
- Hoteling / Beach – Toweling
- Zifty / Grub Hub / Uber Eats
- Netflix / iTunes / Twitter
- Ankle Bracelets
- Airbnb
- Netgrocer / Clicklist / Blue Apron
Trends shaping the E&C Industry

- Availability of labor at all levels is a major concern
- Megaproject proliferation and the trend toward joint ventures
- Technology advances too quickly to become table stakes
- The strategic significance of risk management
- Mergers and acquisitions: remaining strong in many sectors
- Abundant low-cost natural gas is creating tailwinds
- Succession issues threaten the continuity of many firms
- Commercial building segment continues to be a buyer’s market
- Business intelligence is all about knowledge
- Organizational effectiveness is a growing concern
Randy Giggard  
Managing Director  

FMI Corporation  
5171 Glenwood Avenue  
Suite 200  
Raleigh, NC  27612  

Tel:  919.637.1893  
Email:  rgiggard@fminet.com  

www.fminet.com
For over 60 years, FMI has been the leading management consulting and investment banking firm dedicated exclusively to engineering and construction, infrastructure and the built environment.

FMI serves all sectors of the industry as a trusted advisor. More than six decades of context, connections and insights lead to transformational outcomes for clients and the industry.

Sector Expertise

- A/E and Environmental
- General Contractors/CM
- Heavy Civil
- Industrial
- Specialty Trades
- Utility T&D
- Cleantech and Energy Services
- Construction Materials
- Building Products
- Oil and Gas
- Private Equity
- Owners
Segment Presenters

Greg Jacoby, Principal, President - Browning Day Mullins Dierdorf

Sam Mishelow, Chief Strategy Officer - Meyer Najem

Rod Foley, Vice President - North Mechanical

Julia Saltsgaver, Executive Director - Quality Connection
Greg Jacoby

Principal, President
Browning Day Mullins Dierdorf
economic outlook

- December architecture billing Index rates dropped to 52.9 from 55.0 in November
- 2018 projection - steady growth, with estimated growth raised to 2.5% for the year

*From AIA Architectural Billings Index - National*
design/real estate

- People are willing to pay more for high quality space
- We are in a long cycle, not boom/bust. The key to the next few years is to expand horizons in each market.

*From Emerging Trends in Real Estate - ULI*
architecture

trends shaping architecture

- Integration of technology into the design and delivery process is helping to develop sustainable projects
- Resilience in architecture will change the norms in MEP design
- Virtual reality could play an important role in all phases of the design-to-construction process
  - Assessing design options
  - Showcasing proposals
- 3D Printing - still in infancy stages
  - Better visualization for clients
- Drones
  - Site studies and investigations
  - Site observations

*From Licensed Architect Magazine’s Winter 2017 issues article, “Architectural Outlook for 2018”

69% AEC professionals are using virtual reality by 2018
Being asked to provide key design leadership on multidisciplinary large scale, complex site-based projects - more involvement with the site

More integration for a project with specific user needs and multiple benefits in mind

Creating socially equitable places through community engagement and partnerships

“From Licensed Architect Magazine’s Winter 2017 issues article, “Trends in Landscape Architecture”
• Focus on planning proactively for community resilience
• Combatting climate change
• Placemaking and economic development focus
Forward-thinking organizations and their design partners are creating workplaces that support and foster a sense of purpose in the workplace by encouraging communication, connection and empowered action.

Design work spaces that permit people to find meaning in their work through designing human nature.

Designing a working environment that maximizes a person’s purpose

*From Herman Miller Whitepaper “Purpose at Work: Creating Workplaces that improve communication and foster connection”*
Sam Mishelow

Chief Strategy Officer

Meyer Najem Construction
MARKET CICI

Construction Industry Confidence Index measures:
Current market conditions | Conditions in 3-6 months | Conditions in 12-18 months

Based on Responses to Surveys:
- Distributed between Nov. 9- Dec. 12
- > 6,000 US firms
- ENR’s lists: GCs, Subs & Design Firms

Source: ENR, December 25, 2017

>50 = Growing Market
HOW FIRMS VIEW THE MARKET

Source: ENR, December 25, 2017
## MARKET CONFIDENCE BY SECTOR

<table>
<thead>
<tr>
<th>PROSPECTS BY INDIVIDUAL SECTORS BY FIRMS WORKING IN THOSE MARKETS</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image.png" alt="Table Image" /></td>
</tr>
</tbody>
</table>

Source: ENR, December 25, 2017
# LOCAL OUTLOOK

## Total Construction Starts

<table>
<thead>
<tr>
<th>TOTAL CONSTRUCTION</th>
<th>Actual 2014</th>
<th>Actual 2015</th>
<th>Actual 2016</th>
<th>Forecast 2017</th>
<th>Forecast 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NON-RESIDENTIAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commercial and Manufacturing</td>
<td>$757</td>
<td>$588</td>
<td>$816</td>
<td>$749</td>
<td>$875</td>
</tr>
<tr>
<td>Stores and Shopping Centers</td>
<td>$136</td>
<td>$111</td>
<td>$152</td>
<td>$132</td>
<td>$134</td>
</tr>
<tr>
<td>Office and Bank Buildings</td>
<td>$91</td>
<td>$183</td>
<td>$142</td>
<td>$155</td>
<td>$224</td>
</tr>
<tr>
<td>Hotels and Motels</td>
<td>$20</td>
<td>$11</td>
<td>$108</td>
<td>$53</td>
<td>$38</td>
</tr>
<tr>
<td>Other Commercial Buildings</td>
<td>$410</td>
<td>$230</td>
<td>$309</td>
<td>$362</td>
<td>$431</td>
</tr>
<tr>
<td>Manufacturing Buildings</td>
<td>$101</td>
<td>$23</td>
<td>$107</td>
<td>$26</td>
<td>$50</td>
</tr>
<tr>
<td><strong>Institutional</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education Buildings</td>
<td>$242</td>
<td>$93</td>
<td>$177</td>
<td>$117</td>
<td>$176</td>
</tr>
<tr>
<td>Health-Care Facilities</td>
<td>$173</td>
<td>$96</td>
<td>$288</td>
<td>$122</td>
<td>$133</td>
</tr>
<tr>
<td>Other Institutional Buildings</td>
<td>$74</td>
<td>$171</td>
<td>$140</td>
<td>$144</td>
<td>$178</td>
</tr>
<tr>
<td><strong>RESIDENTIAL</strong></td>
<td>$1,700</td>
<td>$1,088</td>
<td>$2,202</td>
<td>$2,425</td>
<td>$2,429</td>
</tr>
<tr>
<td>Single Family</td>
<td>$1,380</td>
<td>$1,471</td>
<td>$1,812</td>
<td>$2,183</td>
<td>$2,036</td>
</tr>
<tr>
<td>Multifamily</td>
<td>$399</td>
<td>$417</td>
<td>$390</td>
<td>$492</td>
<td>$393</td>
</tr>
<tr>
<td><strong>TOTAL NON-BUILDING</strong></td>
<td>$723</td>
<td>$1,465</td>
<td>$382</td>
<td>$741</td>
<td>$749</td>
</tr>
<tr>
<td>Highways and Bridges</td>
<td>$442</td>
<td>$682</td>
<td>$220</td>
<td>$429</td>
<td>$449</td>
</tr>
<tr>
<td>Other Public Works</td>
<td>$70</td>
<td>$92</td>
<td>$98</td>
<td>$97</td>
<td>$97</td>
</tr>
<tr>
<td>Environmental Public Works</td>
<td>$196</td>
<td>$72</td>
<td>$33</td>
<td>$71</td>
<td>$81</td>
</tr>
<tr>
<td>Electric Utilities</td>
<td>$26</td>
<td>$899</td>
<td>$81</td>
<td>$144</td>
<td>$121</td>
</tr>
</tbody>
</table>

## Total Picture

Total Construction Spending Expected to Grow by More Than 5% in 2018

The institutional and commercial and manufacturing sectors should show healthy growth next year.

### Total Picture

- **Total construction**
- **Residential building**
- **Non-residential building**
- **Non-Building**

### Source

Source: ENR Midwest, November 20, 2017
## LABOR OUTLOOK

### TOP 10 RISKS IN THE USA

**Source:** Allianz Global Corporate & Specialty

Figures represent how often a risk was selected as a percentage of all responses for that country.

Respondents: 468
Responses: 586

More than one risk and industry could be selected. Figures don’t add up to 100% as up to three risks could be selected.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Description</th>
<th>Percent</th>
<th>2017 rank</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cyber incidents (e.g. cyber crime, IT failure, data breaches)</td>
<td>45%</td>
<td>2 (34%)</td>
<td>🔻</td>
</tr>
<tr>
<td>2</td>
<td>Business interruption (incl. supply chain disruption)</td>
<td>39%</td>
<td>1 (41%)</td>
<td>🔻</td>
</tr>
<tr>
<td>3</td>
<td>Natural catastrophes (e.g. storm, flood, earthquake)</td>
<td>38%</td>
<td>3 (30%)</td>
<td>🔺</td>
</tr>
<tr>
<td>4</td>
<td>Market developments (e.g. volatility, intensified competition / new entrants, M&amp;A, market stagnation, market fluctuation)</td>
<td>23%</td>
<td>4 (27%)</td>
<td>🔺</td>
</tr>
<tr>
<td>5</td>
<td>Fire, explosion</td>
<td>19%</td>
<td>6 (16%)</td>
<td>🔺</td>
</tr>
<tr>
<td>6</td>
<td>Changes in legislation and regulation (e.g. government change, economic sanctions, protectionism, Brexit, Euro-zone disintegration)</td>
<td>17%</td>
<td>5 (20%)</td>
<td>🔺</td>
</tr>
<tr>
<td>7</td>
<td>Loss of reputation or brand value</td>
<td>14%</td>
<td>7 (15%)</td>
<td>▲</td>
</tr>
<tr>
<td>8</td>
<td>New technologies (e.g. impact of increasing interconnectivity, nanotechnology, artificial intelligence, 3D printing, drones)</td>
<td>13%</td>
<td>8 (12%)</td>
<td>▲</td>
</tr>
<tr>
<td>9</td>
<td>Climate change/increasing volatility of weather (NEW)</td>
<td>11%</td>
<td>-</td>
<td>🔺</td>
</tr>
<tr>
<td>10</td>
<td>Talent shortage (NEW)</td>
<td>11%</td>
<td>-</td>
<td>🔺</td>
</tr>
</tbody>
</table>

**Source:** Gallagher Construction Services Industry
**FINDING SKILLED WORKERS**

**DEGREE OF DIFFICULTY IN FINDING SKILLED WORKERS IN 2017**

- Nearly 95% of contractors had a moderate to difficult time finding skilled workers for their job openings in the second quarter of 2017, according to a report from the U.S. Chamber of Commerce.

- Contractors in the Northeast had the least trouble finding skilled workers, but plan to hire fewer new positions in the next 6 months, according to the study. In the Northeast, 44% of contractors planned to hire new workers compared to 66% of contractors nationwide.

**PROBLEMS FINDING SKILLED WORKERS**

- Contractors report that they expect a larger challenge in the next six months than they had in the previous six months when it comes to hiring workers with adequate skills. Contractors in the Northeast expect the problem to worsen more drastically than in the South, Midwest, or West.

Source: COMMERCIAL CONSTRUCTION INDEX

GRACE DONELLY/FOURTUNE
Rod Foley
Vice President
North Mechanical
Last Two Years...
Today...
Fall of 2018...
Rising Costs...

- Material
- Field Labor
- Management Labor
- Other Trades
Political Actions...

- Tax Reform
- Infrastructure commitments
- DOC Tariffs
- Other
Julia Saltsgaver
Executive Director
Quality Connection
World Class Facilities, Emerging Technologies and Critical Partnerships Require Best-In-Class Solutions!

Because electrical, information technology and communications systems are essential... Quality Connection is on your Expert Team!

We can help design, build and service Central Indiana’s complex, sophisticated centers.

- 100 of the most successful and expert electrical contractors making a difference for our customers on new construction, renovation of existing facilities and maintaining essential systems.
- 2,600 highly skilled, productive IBEW #481 members combine technical and hands-on instruction with a strong work ethic that delivers productivity, safety and responsibility.
World Class Facilities, Emerging Technologies and Critical Partnerships Require Best-In-Class Solutions!

Quality Connection • Quality Work • Customer Connected

www.qcindy.com
World Class Facilities, Emerging Technologies and Critical Partnerships Require Best-In-Class Solutions!
World Class Facilities, Emerging Technologies and Critical Partnerships Require Best-In-Class Solutions!

**Best In Class Project Management**
- Innovative, Customer-Focused
- High Standards & Superior Performance
- Done Right the First Time
- On Time & On Budget

**Design, Build and Service**
- Advanced Manufacturing, Life Sciences, Hospitals, Logistics and Distribution, Utilities, Education
- Transit & Infrastructure, Hotels, Retail, Multi-Tenant Office, Multi-Tenant Residential

**Highly Skilled, Reliable and Safe Workforce**
- 5 years, 9,000 hours combined classroom & on-the-job & training
- Industry leading curriculum
- Expert instructors
- State-of-the-art facility
- Drug free work force

Quality Connection • Quality Work • Customer Connected

www.qcindy.com
Managing Talent Supply To Meet Demand

IBEW #481
• Journeymen electricians
• Communications Technicians
• Apprentices
• Construction Helpers

NECA Electrical Contractors
• Project Managers
• Engineers
• Estimators
• Foremen
• Superintendents

Quality Connection • Quality Work • Customer Connected  www.qcindy.com
Managing Talent Supply To Meet Demand

• Understand Key Demand Factors

• 5 year trend line consistent with JATC apprentice training timeline

• Projects in the pipeline/bidding

• Broader economic indicators

• Gauge “All-Trades” projects for the duration and talent need
Managing Talent Supply To Meet Demand

5 Year Demand Index

Quality Connection • Quality Work • Customer Connected
www.qcindy.com
Managing Talent Supply To Meet Demand

5 Year Supply Index

Quality Connection ● Quality Work ● Customer Connected
www.qcindy.com
Managing Talent Supply To Meet Demand

Leverage IBEW Talent Resource Tools to Address Short Duration Needs

- **IBEW Travelers**
  - 12 IBEW locals in Indiana
  - Bloomington, Muncie, Terre Haute, Kokomo, Lafayette, etc. within a short drive to jobsite
  - Offers additional 7,000 IBEW members

- **IBEW Retirees**
  - Strategically enable retirees to return to active status
  - Fill short duration project needs
  - Leverages their long-term expertise
  - Typically recent retiree; solid work reputation & experience

Quality Connection • Quality Work • Customer Connected

www.qcindy.com
Managing Talent Supply To Meet Demand

- NECA & Industry Partnerships
  - Ball State University, Purdue University
  - Industry Professional Development/Leadership Programs

- Contractor Specific Efforts
  - Internships
  - Work-study programs

- Mentor Programs
  - ACE Mentor
  - ISA Leadership

Quality Connection • Quality Work • Customer Connected
Managing Talent Supply To Meet Demand

• Amplify Career Value and Recruit Constantly
  • Ensure Long Term Supply
  • Attract the Brightest Young Professionals

• Industry Partnerships
  • Built To Succeed
  • Build Your Future

• Workforce Development & Career Fairs
  • High School Technical Education Programs
  • Employer Managed Events
  • Youth serving organizations such as Indiana Youth Institute
Managing Talent Supply To Meet Demand

5 Year Demand to Supply Trend Index

- Labor Demand Electrical
- Labor Supply Electrical
Questions for Our Experts
SPACE

AN EDUCATIONAL PROGRAM BROUGHT TO YOU BY THE INDIANA CONSTRUCTION ROUNDTABLE

Space can be an asset, a liability, a resource, a responsibility, or a tool for owners to utilize in their day to day missions. This educational program will feature panelists from Eli Lilly, the City of Fishers, IU Health, and Gershman Partners.

Join Us March 8th at 7:30 AM
1201 Central Avenue, Indianapolis, IN 46202

Register Today: indianaconstruction.org