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THE MAGAZINE OF THE MASTER BUILDERS' ASSOCIATION OF WESTERN PENNSYLVANIA

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PUBLISHER'S NOTE

Like many of you readers, I had a formative experience working in a mill. Unlike many of you, my experience was in a yarn mill not a steel mill.

My father was a plant manager for Armstrong at a raw material-to-yarn mill in Beech Creek, PA, that supported its carpet business. I spent the four summers following high school working there. The experience had an oversized impact on my life. First the work paid well enough, roughly three times the minimum wage, that I could afford to pay for college. That alone would have been valuable enough, but the lessons learned on that plant floor lasted much longer than the undergraduate education.

Two of those four summers were spent working the graveyard shift. My father was determined that his kid would not get preferential treatment, so I was the only summer help who worked midnight to 8:00. (Neither of my brothers worked the midnight shift, so he got over that concern fairly quickly.) That was a lesson in applied ethics. Not only was I prepared to be treated no better than the other employees, but I also had the distinct impression that the expectations for my work and work habits would be higher than the others. That turned out to be a real gift.

The work itself had a lasting impact. I was a college kid, and the work seemed mind-numbingly boring. That impression was confirmed by my peers who were working there full-time and did anything to break the monotony. At the same time, I observed that most of the employees who were making their living at the plant were good at what they did and did not seem to find the work as boring as I did.

Of course, within a few years I found out that work, particularly entry level work, can be monotonous, whether that's on the floor of a manufacturing plant or in an office. All work has dignity. There is a gravity to manufacturing work (and construction for that matter) that is missing from white collar work. I saw that a few years after I graduated from college, when some of the manufacturing plants in my hometown closed their doors.

Manufacturing makes a significant investment in a place. The investment in the physical plant of a mill dwarfs that of a shopping center or an office lease. Manufacturers tend to be very invested in their communities, sponsoring the Little League team or the annual Thanksgiving parade. The people who work in those mills are raising families on their wages, owning homes and circulating those wages

throughout the local economy. That economic dynamic was once very visible in Western Pennsylvania. A single manufacturing plant supported entire small towns, which were often located just a few miles from each other, but were self-contained, self-sporting economies. The gravity of those mills on those mill towns became all too apparent when the mills began to shut down.

I started my career as a Dodge reporter, calling on architects, engineers, and owners every day during that time when mills were shutting down all over Western PA. At the time I was relocated to Charlotte, NC, in late 1983, it was already becoming apparent that Pittsburgh was evolving into a white-collar economy. Like many, I saw that as a good thing. The manufacturing that I saw and knew had become bloated. Cheaper labor and better technology in other parts of the world left American manufacturing uncompetitive. It was better, I thought, to let them make stuff while we made more money as accountants and lawyers and doctors (and publishers).

Four decades later, it is easier to see that there is no more permanence or security in a white-collar economy. We have begun to get re-educated about the economic gravity of manufacturing. Shell Chemicals, for example, has not created a new petrochemical industry hub in Beaver County, but its operations there have been transformative for the communities around it. The same thing is happening in New Kensington and in Canonsburg where manufacturers that are competitive on the global stage are thriving.

Pennsylvania has a long way to go before it will be truly competitive with its neighbors to the west and south. Our elected officials and the electorate will have to change the way they think about revenues and incentives to get there, but it's a journey worth making. It turns out that a diverse economy requires a diversity of employers. It is exciting to live in a region where the cutting edge of medicine or technology is being explored. But we must make stuff here too if we really want an economy for all.



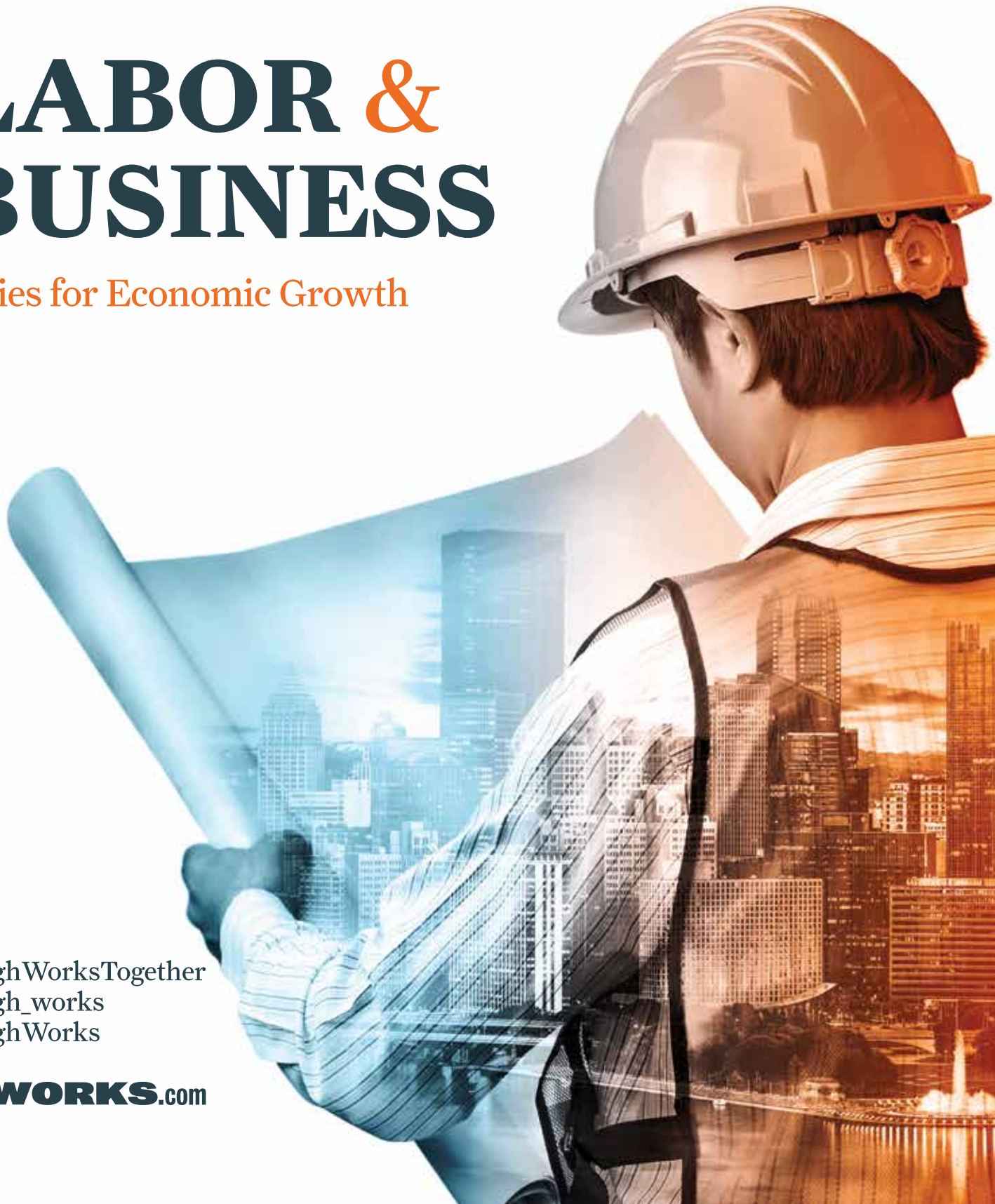
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REGIONAL MARKET UPDATE

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The U.S. Bureau of Labor Statistics issued its annual revisions to the monthly Employment Situation Summary on August 21, which showed 818,000 fewer jobs were created than originally estimated in the monthly reports. Along with the rising unemployment rate, the report cemented the assumption that the labor market was softer than the headline numbers were showing. That softness does not appear to be extending to Western PA, however.

Thus far, the more limited pool of workers has insulated metropolitan Pittsburgh from the steeper increase in unemployment rate that the U.S. has experienced. Through July, unemployment in Pittsburgh remained below four percent, compared to a 4.5 percent rate nationally. The labor force in Pittsburgh, at 1.193 in June, has been steadily gaining since falling to a cyclical pandemic level of 1.172 million in December 2021.

A comparison of workforce indicators through May 2024 suggests that Pittsburgh's labor market may remain stronger as the U.S. economy slows. Pittsburgh's labor force grew 1.9 percent year-over-year, nearly triple the growth rate of Pennsylvania and four times the U.S. rate. And while job postings have been falling nationwide over the past year, Pittsburgh employers still have strong demand for more workers. From April through June 2024, there were 30,490 job postings in Western PA, an increase of 17.9 percent over a year ago.

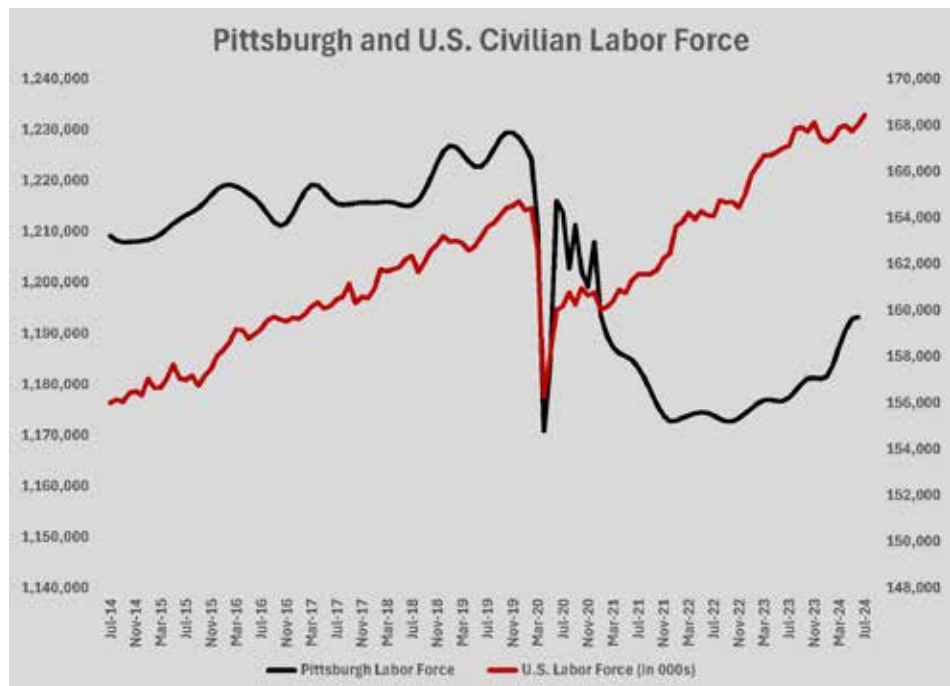
The respective arcs of the post-pandemic labor force recoveries in Pittsburgh and the U.S. have been strikingly different. Nearly five percent of the U.S. labor force of 164 million fell off between February and April 2020, while 4.4 percent of Pittsburgh's labor force declined during the same period. By June, the labor force in Pittsburgh had recovered to 0.8 percent of the February level; however, the Pittsburgh workforce began declining the following month and continued to fall through September 2022, when the labor force was again at the post-pandemic low point. The workforce has since climbed 1.8 percent. By contrast, the U.S.

labor force began recovering in April 2020 and reached pre-pandemic levels by April 2022. The current U.S. civilian labor force stands at more than 168 million.

Employers consider workforce growth as a determining factor in site selection for new locations and expansion. The slower rate of labor force recovery is a drag on economic growth in Western PA.

Pittsburgh's economic vitality is outstripping the U.S. economy on several measures, while still lagging on workforce and employment. According to the Southwestern Pennsylvania Quarterly Vitals Report on the second quarter, released by the Allegheny Conference on Community Development in August, there has been double-digit growth in air travel (up 10.6 percent year-over-year) and cargo shipments (up 17.8 percent). Compared to 2019 levels, Pittsburgh's number of seated diners is 156 percent of 2019, and revenue per available room (RevPAR) is 121 percent of the 2019 RevPAR. Both labor force and job recovery are 98.1 and 98.7 percent of the 2019 levels, more than five points below the U.S. recovery rate.

Pittsburgh's economic output is lagging the U.S. economy as this business cycle stretches on. A comparison of gross



Pittsburgh's labor force recovery has been slower and less robust than that of the U.S. overall. Source: Bureau of Labor Statistics, Federal Reserve Bank of St. Louis.

| Workforce Indicators - May 2024 | | | | |
|----------------------------------|----------------|------------|---------------|-----------------|
| | Pittsburgh MSA | | United States | Benchmark Total |
| | Value | YOY Change | YOY Change | YOY Change |
| Labor Force | 1,198,642 | 1.9% | 0.5% | 0.7% |
| Payroll Employment | 1,182,000 | 1.5% | 1.7% | 0.9% |
| Unemployment Rate | 3.2% | 0.0 ppts | 0.3 ppts | 0.5 ppts |
| Job Postings (Apr. 24 - Jun. 24) | 30,940 | 17.9% | 4.1% | 6.2% |

Data current as of 7/8/24, the Unemployment Rate reflects the non-seasonally adjusted rate.
Source: Bureau of Labor Statistics, Local Area Unemployment Statistics, Current Population Survey, Lightcast (dataun 2024.2)

Pittsburgh's labor market is faring better as the U.S. economy slows. Source: Southwestern Pennsylvania Quarterly Vitals Q2-2024, Allegheny Conference on Community Development.

regional product to U.S. gross domestic product (GDP) is rarely made because of the delay in calculating the regional output. Using U.S. Bureau of Economic Analysis data from June 2024 that calculated the gross regional product at the end of 2022, Pittsburgh represented one percent of U.S. real GDP of \$18.1 trillion. Over a 10-year period, Pittsburgh economy has grown faster than the U.S. growth rate; however, the U.S. economy has been growing faster than Pittsburgh's since the pandemic ended.

From 2012 to 2022, the U.S. GDP grew 34.7 percent, compared

with Pittsburgh's 48.2 percent growth rate (and Pittsburgh's 52 percent private industry growth rate). Over a five-year period the rate of growth is virtually identical at around 20 percent. From 2021 to 2022, however, Pittsburgh's 7.5 percent growth in regional product lagged the 11.1 percent jump in U.S. GDP growth.

The supportive economy has been a boon to Pittsburgh's retail, hospitality, and housing markets, all of which are seeing strong demand. Industrial leasing activity is improving, which is helping

absorb the overhang of new industrial construction that wrapped up in 2022-2023. Construction activity is higher for new retail and dining tenant improvements. The low volume of new housing starts and existing homes for sales has pushed apartment rents slightly higher at a time when rents are softening nationwide.

Contracting and bidding activity has slowed in the latter half of the third quarter. There is some seasonality to the slowdown, which should be reversed after Labor Day. Much of the slowdown can be attributed to the anticipation of lower



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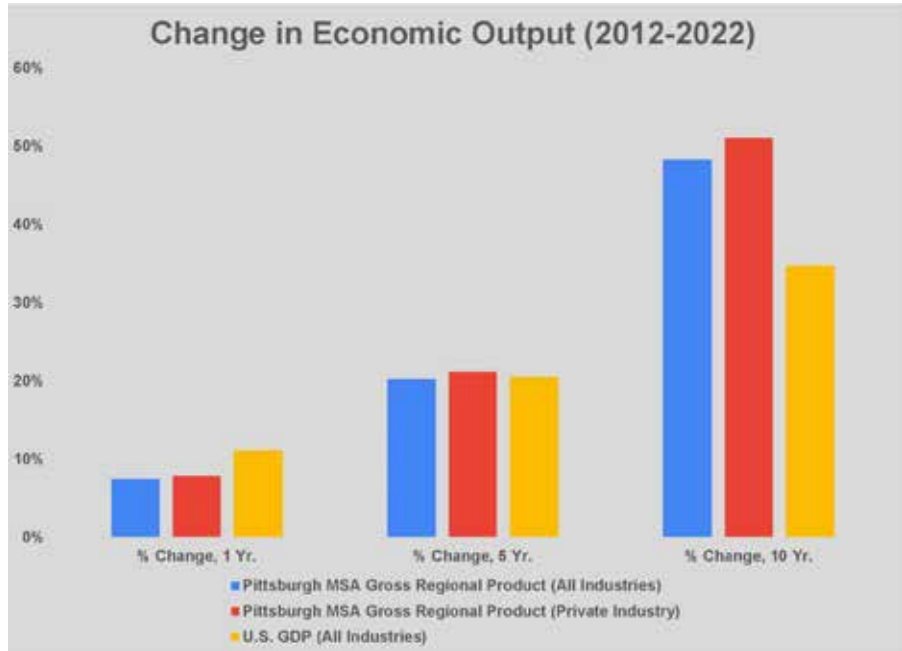
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interest rates and the uncertainty that is typically associated with presidential elections.

While it may seem counterintuitive that an outlook of lower interest rates would slow activity, there is more certainty that rates will come down more quickly during the first half of 2025. That certainty can pause projects that have been cost justified but will have construction loans, since the short-term floating rates will move lower more quickly if monetary policy eases. Should the Federal Reserve cut Fed Funds by more than a half-point over the course of the next three months, developers may move more quickly, especially in Pittsburgh's multi-family sector.

Apartment construction has been notably higher in 2024, after two years of starts that were considerably below the 10-year average. Work started in late July and August on several new projects, the 232-unit Meridian in Shadyside, the 234-unit Maxx and Alex



Pittsburgh's gross regional product has grown slower than U.S. GDP since the pandemic ended. Source: U.S. Bureau of Economic Analysis, Pittsburgh Region Data on Demand.



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Apartments in the Strip District, and the 464-unit Old Stone Commons in Monroeville. Through August, 2,336 apartment units had been started, an increase of 1,550 units over the same period in 2023 and a 72.4 percent increase over the total number of multi-family units begun in all of 2023. More than 7,000 apartment units have been entitled in the pipeline throughout the region. With more certainty that the permanent financing market for apartments will be favorable when construction is completed in 2026, construction may begin before year's end on enough units to push the 2024

total above 3,000 units. That is a level that has been reached only once, in 2016, during the past 30 years.

Other interest-sensitive property types are less likely to be boosted in Western PA by lower rates. Office development is frozen by long-term cyclical problems of too much available space. Industrial development is likely to pick back up by mid-2025, as available space is leased up amid renewed higher demand for distribution and logistics. Single-family construction remains muted by low lot inventory and a less profitable development environment.

Institutional projects continue to dominate the construction market, especially from a labor utilization perspective. University of Pittsburgh and Carnegie Mellon University each have more than one major capital project under construction. Construction of UPMC's \$900 million Heart and Transplant Hospital at UPMC Presbyterian is well underway. And work at the Pittsburgh International Airport's \$1.5 billion Terminal Modernization Program is at its peak, with construction to continue another year towards a mid-September 2025 opening. Pittsburgh Regional Transit opened bids after Labor Day for the Uptown-to-Oakland Loop of the \$290 million Bus Rapid Transit system.

Fall is typically a season when bidding picks up. Labor Day seems to remind corporate and institutional owners that the calendar budget year is ending. To the degree that there are federally-funded projects in the market, those must be bid and/or committed by September 30. Owners that wish to get a head start on the following construction season, particularly public schools and colleges, will bid major capital projects to take advantage of contractors' desire to build backlog for the coming year.

The year 2024 should be atypical, if for no other reason than the presidential election, which generally dampens activity. There are forces pulling the market in opposite directions. Commercial properties with pent-up demand, such as multi-family, will be buoyed by the near certainty of lower interest rates in the next six months. Higher construction costs continue to be a drag on decision making. A tight labor market seems to be making contractors more selective. And the macroeconomic outlook is at least slightly pessimistic.

Expect the post-Labor Day period to be more active than August has been but do not be alarmed if the caution persists through the holidays. **BC**


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NATIONAL MARKET UPDATE

Macroeconomic trends change slowly. Most economic trends tend to appear months or years after the events occurred that drove the trend. The Employment Situation Summary report, the monthly jobs report, on August 2 may prove to be that rare pivot that is the exception.

The August 2 report seemed to let the air out of the balloon that is the U.S. labor market. The headline 114,000 job creation number was well below the consensus forecast, but the bump in unemployment rate to 4.3 percent was the surprise that triggered the market reaction. Stocks reacted quickly and strongly, dropping in response to the potential recession, despite the potential decline in interest rates. The S&P 500 fell 6.1 percent from July 31 to August 5. Bond yields also dipped significantly. The long-term rates, like the 10-year Treasury yield, fell below 3.7 percent, a decline of a full percentage point from three months ago. The inverted yield curve flattened.

By the end of the following week, however, markets regained equilibrium. Stocks recovered half the week's decline (nearing record highs again shortly thereafter), and the 10-year Treasury settled at four percent. But the outlook for long-term rates shifted dramatically lower, a good sign for construction as the year winds down.

Jobs data had been masking the underlying weakness growing in the economy for most of 2024. Although many of the headline economic indicators – gross domestic product (GDP), consumer spending, core inflation – pointed to solid

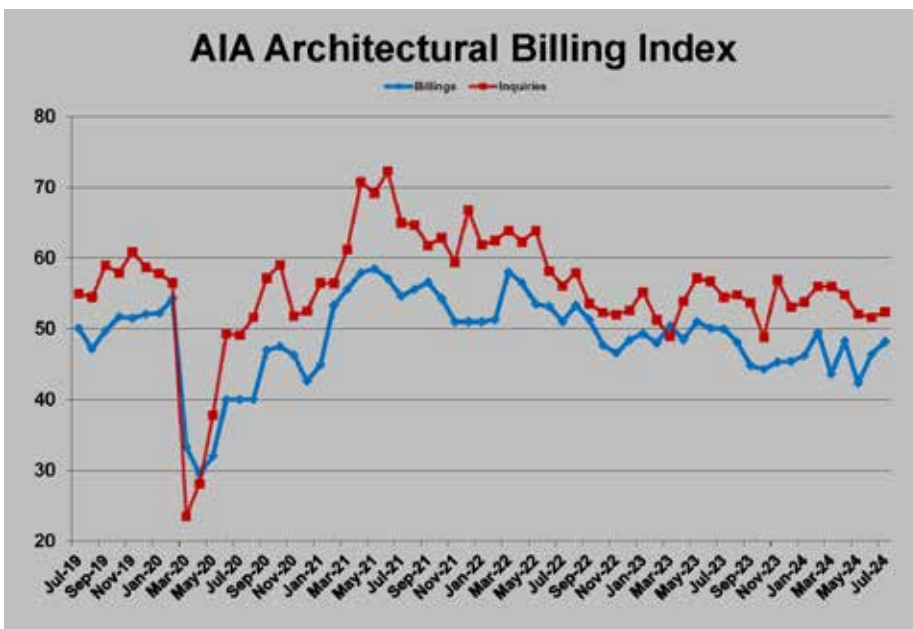
economic growth, the data on employment was deteriorating. Monthly job gains had been revised downward in following month's reports most of 2024. More importantly, the household survey piece of the Employment Situation Summary has been negative for several months. The household survey showed higher unemployment and revealed that most of the recent months' employment gains were part-time.

An analysis of July's data at the state level found that the hiring slowdown was broad based. The unemployment rate ticked up in 28 of 50 states, the highest number since September 2023. As the national unemployment rate moved higher in recent months, more states saw unemployment decline as saw an increase in jobless rates. Only four states experienced a decline in unemployment during July.

One positive reaction to the August 2 report is likely to be a shift in monetary policy by the Federal Reserve Bank. In recent months' meetings of the Federal Open Markets Committee, the emphasis had shifted to the Fed's full employment mandate. While public remarks from Fed Chair Jerome Powell kept inflation reduction as the Fed's primary goal, his observations about the softening labor market increased. The July report seems to have assured a cut in the Fed Funds rate in September – perhaps by 0.5 percentage points – and another by the end of year.

Market expectations for long-term rates shifted significantly lower. Wall Street banks adjusted forecasts for 10-year Treasury yields to below 3.5 percent by mid-2025. The average yield for the 30-year fixed-rate mortgage fell below 6.5 percent for the first time since May 2023. Although inflation still has another half percentage point to fall to reach the Fed's two percent goal, it is clear that the economy requires an end to restrictive monetary policy.

The impact of restrictive monetary policy lags the tightening by various timeframes, depending on the activity. For construction spending, declines tend to show up 12 to 18 months after rate hikes begin. For design activity, however, higher rates will cool off conditions within a few months. The AIA/Deltek Architectural Billings Index, a monthly survey of American Institute of Architects (AIA) firms, turned negative six months after the Fed Funds rate increases began in March 2022. The index has registered a reading above 50 only four times in





Source: Bureau of Labor Statistics.

the past 21 months, dipping to 42.4 in May. Given the lag between design and construction, that extended negative curve indicates that construction spending will remain slow through spring 2025.

The report on July's inflation rate continued the months' long disinflation trend, dropping below three percent year-over-year for the first time since March 2021. Consumer prices (CPI) were 2.9 percent higher than a year ago. Both CPI and core CPI (which excludes energy and food) prices were 0.2 percent higher from June to July.

As has been the case for most of the past year, housing is the primary driver of inflation at this stage of the cycle. Housing prices and rent inflation accounted for 90 percent of the CPI. The price indexes for car insurance and furnishings also pushed inflation higher. Volatile energy costs were level and prices for used cars and trucks, healthcare, air travel, and clothing all declined month-to-month. Grocery prices rose 0.1 percent from June and the cost for dining out was 0.2 percent higher.

The lower rate of inflation should remove any remaining obstacle to a reduction in the Fed Funds rate

at the September Federal Open Markets Committee meeting. Economists forecast that it will be the first of a series of cuts to occur through the end of 2025, resulting in borrowing costs that will be 100-150 basis points lower than today. Residential and commercial construction will benefit significantly in 2025 if that scenario plays out.

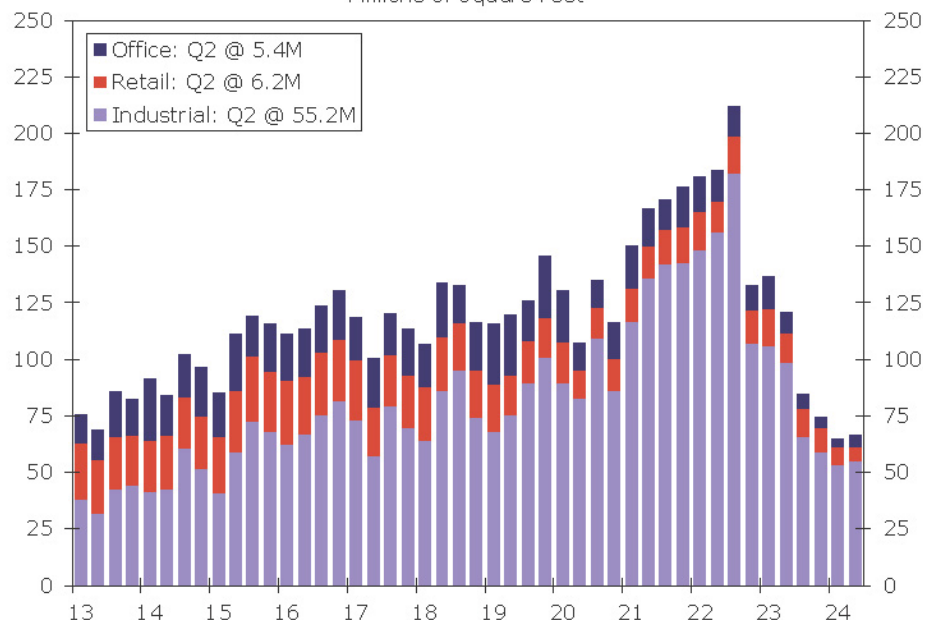
Other indicators of the economy's health pointed to a slowdown. New orders for manufactured goods fell by 3.3 percent in July to \$564.2 billion. Applications for new businesses dipped 2.1 percent to 420,802. Business investment was higher due to higher spending on software and intellectual property, but equipment investment is only five percent above pre-pandemic levels. Gross domestic product growth in the second quarter rose to 3.0 percent but was buoyed by consumer spending that accounted

for more than half the gain.

Construction spending in June fell by 0.3 percent, to \$2.14 trillion, compared to the revised May total. The total construction spending during the first six months was \$1.035 trillion, an 8.6 percent increase over the \$952.5 billion spent during the first six

Commercial Construction Starts

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Source: Costar Inc. and Wells Fargo Economics



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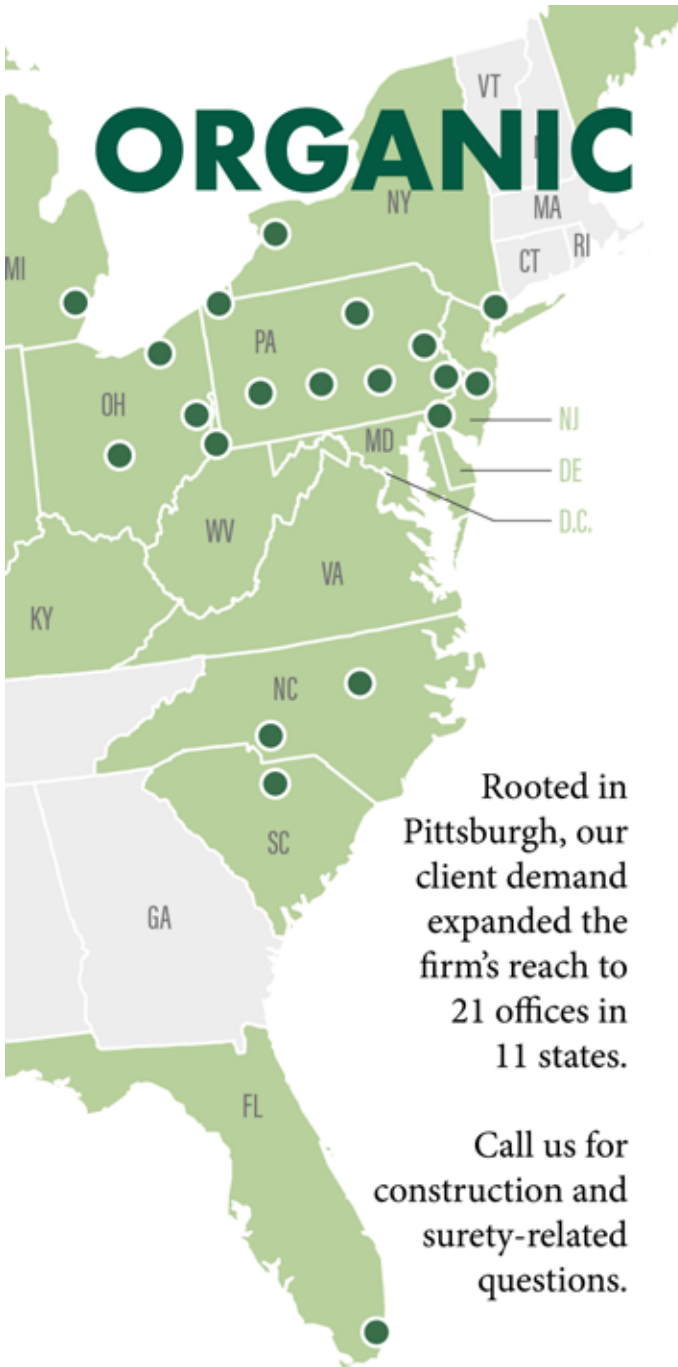
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Source: U.S. Department of Commerce and Wells Fargo Economics

months of 2023. Compared to June 2023, the biggest increases in construction were in public safety (up 28 percent), manufacturing (19.1 percent), power (12.2 percent), and transportation (9.9 percent). The biggest declines were in commercial (down 13.5 percent) and lodging (9.8 percent). Both public and private spending were off from May to June, down 0.4 percent and 0.3 percent respectively. Year-over-year, private construction spending was 5.9 percent higher, while public construction spending was up 7.3 percent.

Escalation of construction costs is still running ahead of the overall rate of inflation but has settled back closer to its long-term three percent level. A comparison of the latest construction spending totals to those from comparable economic conditions prior to the pandemic shows how challenging the environment has been. Construction spending reached a cyclical high in January 2020 of \$1.437 trillion. The Census Bureau does not adjust for inflation, so the June total construction spending represents a 48.9 percent increase during the past 54 months.

A panel of nine leading construction forecasters downgraded its outlook for 2025 at mid-year. The AIA mid-year Consensus Construction Forecast projected an increase of 7.4 percent in nonresidential spending for 2024; however, the economists expect that spending will slow to two percent in 2025, as the impact of market challenges in several key sectors drags new starts lower throughout the last half of this year.

Forecasters expect the extended difficult lending environment, weaker commercial property values, and ongoing decline in architectural billings to weigh on activity next year. The Consensus Construction Forecast predicts flat spending on commercial buildings and manufacturing projects – following a 14 percent increase in 2024 – and a slight uptick of four percent for institutional construction in 2025.

The prospect of significantly lower mortgage rates in 2025 is buoying the outlook for homebuilders and bankers for the coming year. While a return to a 30-year fixed mortgage rate below six percent should be a catalyst for first-time homeowners, there is a hangover effect from the decade

of near-zero interest rates that may mute this anticipated recovery. A majority of American homeowners have such low rates that moving up may be too costly and keep the supply of homes for sale low.

Consumer spending still drives the U.S. economy. Even as the unemployment rate has floated higher by almost a full percentage point in the past year, consumers have maintained the same pace of spending – including a surprising bump of 1.0 percent from June to July. Concern has been growing about the increased dependence on credit cards for continued consumer spending, especially as credit card delinquency has risen by nearly 50 percent, to almost \$600 million, since 2012. An August analysis of household debt service coverage by SMBC Group showed that the current ratio was below 10 percent. That debt service ratio is below the long-term average of 11.1 percent, and well below the 13.4 percent ratio that households experienced in 2009.

The reason for the low – and more manageable – debt ratio in the face of higher credit-fueled spending is the historically low mortgage burden for the average household. While more households are becoming stressed financially, regardless of the mortgage rate, more than half of the homeowners still had mortgage rates below four percent in August. A Redfin analysis of Federal Housing Finance Data found that 59.4 percent of mortgages were below four percent and 89 percent were below six percent at the end of 2023. Nearly one in four were below three percent. A June report by the National Association of Realtors found that the average home mortgage consumed 24 percent of household income, roughly four percentage points lower than the long-term average.

Thus far, the lower mortgage burden on households has perpetuated lifestyle spending that is keeping the economy growing, even as unemployment has increased. As both short-term and long-term rates fall later this year and into 2025, that lower credit burden should be a bulwark against a credit-induced recession. **BG**

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WHAT'S IT COST?

Inflation trended lower from May to July across most measures. Consumer inflation, as measured by the Consumer Price Index (CPI) and Core CPI both fell to the lowest levels since early spring 2021. Core inflation, which strips out the more volatile energy and food costs, fell below the 2.5 percent annual level that the Federal Reserve Bank was forecasting for year-end 2024. The Producer Price Index (PPI) was flat from June to July and up 2.2 percent year-over-year.

Prices for most basic construction materials were less than 0.2 percent higher in July than in June. Almost all the year-over-year changes in PPI for inputs from major construction categories were below three percent. PPI for new nonresidential buildings moved higher by 0.8 percent from June to July and recovered from negative territory year-over-year, increasing by 1.3 percent.

There were fewer notable outliers from the overall trend, but some bear watching. The prices of some materials more heavily used in infrastructure remain higher. Cement was 0.5 percent higher for the month and 6.3 percent higher year-over-year. Prices for concrete products fell 0.1 percent but were still 4.6 percent higher than a year earlier. Construction sand/gravel/crushed stone were 7.4 percent higher than in July 2023. Diesel fuel prices remained volatile, spiking 11.9 percent from June to July (although 13.2 percent lower than in April) and 6.7 percent from July 2023. For materials used primarily in buildings, copper mill shapes were 12 percent higher year-over-year, despite a drop of 1.7 percent for the month, and copper scrap was up 15.8 percent.

Steel prices have been falling again. Prices for steel mill products (down 14 percent year-over-year), steel pipe (down 6.5 percent), steel joists and rebar (down 23 percent), and fabricated structural steel for non-industrial buildings (down 30.2 percent), led the pullback in steel prices. The price of lumber fell 1.0 percent from June to July and 7.2 percent for the year.

Wages, salaries, and total compensation for construction workers grew at a dramatically lower annual rate in July than in May. Total compensation for construction workers in May was 4.2 percent higher than a year earlier. In July, compensation growth fell to 2.8 percent year-over-year, more than

a point lower than the total compensation inflation for private industry.

With construction activity flattening or declining slightly the remainder of the year, there should be less upward pressure on prices. Escalation will continue to be higher than the overall rate of inflation – and of material inflation – because of the shortage of labor. Any significant price increases or decreases are more likely to result from global geopolitical events than from imbalanced supply and demand due to construction activity. **BG**

| PERCENTAGE CHANGES IN COSTS | | | |
|--|-----------------------|--------|--------|
| Consumer, Producer & Construction Prices | | | |
| | July 2024 compared to | | |
| | 1 mo. | 3 mo. | 1 yr. |
| Consumer price index (CPI-U) | 0.0 | 0.6 | 3.0 |
| Producer price index (PPI) for final demand | 0.0 | 0.4 | 2.2 |
| PPI for final demand construction | 0.7 | 1.1 | 1.2 |
| PPI for new nonresidential buildings | 0.8 | 1.2 | 1.3 |
| Costs by Construction Types/Subcontractors | | | |
| New warehouse construction | 0.3 | 0.3 | 0.6 |
| New school construction | 1.4 | 1.3 | 1.8 |
| New office construction | 1.3 | 2.5 | 2.5 |
| New industrial building construction | (0.1) | 0.0 | 0.3 |
| New health care building construction | 0.3 | 0.3 | 0.1 |
| Concrete contractors, nonresidential | (0.5) | (0.2) | 2.9 |
| Roofing contractors, nonresidential | 0.9 | 0.7 | 2.3 |
| Electrical contractors, nonresidential | 1.3 | 1.4 | 2.2 |
| Plumbing contractors, nonresidential | 0.1 | 0.3 | 1.3 |
| Construction wages and benefits | N/A | 0.1 | 2.8 |
| Architectural services | 0.4 | 0.6 | 2.1 |
| Costs for Specific Construction Inputs | | | |
| #2 diesel fuel | 11.9 | (13.2) | 6.7 |
| Asphalt paving mixtures and blocks | 0.8 | 0.2 | 4.4 |
| Cement | 0.5 | 0.7 | 6.3 |
| Concrete products | (0.1) | (0.3) | 4.6 |
| Brick and structural clay tile | 0.1 | 0.7 | 4.8 |
| Plastic construction products | 0.1 | (0.4) | 0.0 |
| Flat glass | 0.4 | 0.2 | 1.2 |
| Gypsum products | 0.1 | 1.7 | 4.3 |
| Lumber and plywood | (1.0) | (3.2) | (7.2) |
| Architectural coatings | 0.0 | 0.0 | 0.0 |
| Steel mill products | (3.3) | (4.8) | (14.0) |
| Copper and brass mill shapes | (1.7) | 4.9 | 12.0 |
| Aluminum mill shapes | 0.6 | 7.6 | 4.7 |
| Fabricated structural metal | (0.2) | (0.9) | (9.9) |
| Iron and steel scrap | 2.5 | (1.7) | 0.9 |
| Source Bureau of Labor Statistics, Updated August 15, 2024 | | | |
| Compiled by Ken Simonson, AGC Chief Economist | | | |

MAN CO





MANUFACTURING CONSTRUCTION UPDATE

Pittsburgh has a long, interesting, and confounding history of manufacturing. One of the most defining stories about current-day Pittsburgh is its successful recovery from the loss of hundreds of thousands of jobs when the steel industry left town in the mid-1980s.

Shell Chemicals' polymer plant in Beaver County (shown here under construction) represents the largest single investment in manufacturing in Western PA. Photo by Allegheny Conference on Community Development.



Battery maker EOS received a \$500 million loan guarantee to expand its manufacturing, which is now located in Turtle Creek. Photo by Allegheny Conference on Community Development.

Over the past generation, a more diverse economy has evolved that is more durable and less volatile than its industrial predecessor. And yet, it is also true that stuff is still made in Pittsburgh, including steel. Moreover, since the pandemic, there is a growing realization that a strong economy includes a strong manufacturing component. And now there is policy to back that up.

Coming out of the pandemic, the Biden administration proposed two major pieces of legislation that included enormous subsidies that will drive the development of new manufacturing facilities. The CHIPS and Science Act of 2022 (CHIPS) provided \$52.7 billion for research, development and manufacturing for the semiconductor industry to reduce the dependency on microchips produced overseas. The Inflation Reduction Act of 2022 (IRA) also included \$39 billion in funding that will support new manufacturing in the energy sector.

Closer to home, Governor Shapiro came into office with a mandate to improve Pennsylvania’s competitiveness, working with a split legislature. Republican and Democrat representatives have cooperated to reduce PA’s corporate net income tax, streamline permitting, and provide \$500 million to attract new businesses.

Pittsburgh has some advantages that should spell success for a manufacturing growth cycle. Those rivers that first attracted

industry 150 years ago still flow through the region. Rail access is better than in most regions. And, theoretically at least, we have the power infrastructure to serve more manufacturing (more about that to come.)

Operating in an environment that is pro-manufacturing is no guarantee that manufacturing is going to grow in Western PA. Federal largesse tends to be doled out in higher share to places, like Pennsylvania, that determine national elections. Before the current federal policy can provide support for Pennsylvania manufacturing projects, the environment for attracting and growing an industrial base needs to be improved. There are significant challenges to be met at the state and local level in order for the commonwealth to be competitive with other states that are attracting manufacturers more successfully.

The Manufacturing Environment

The United States has seen a surge in manufacturing construction spending since the end of 2021, with spending on construction for the computer, electronics, and electrical manufacturing sector quadrupling since the beginning of 2022. This boom is driven by growing demand for semiconductors and automobiles, reshoring, and supportive federal policy aimed at increasing U.S. manufacturing.

Since the end of the pandemic, more companies are moving



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manufacturing operations back to the U.S. to reduce reliance on overseas labor and improve supply chain resilience. This trend is also driven by rising labor costs in other countries and supply chain disruptions.

The Infrastructure Investment and Jobs Act (IIJA), IRA, and CHIPS Act have provided funding and tax incentives for manufacturing construction. A look at the breakdown of construction by major industries suggests that the legislation had less impact than market forces. Real manufacturing spending on transportation equipment, chemicals, food, beverage, and tobacco has increased at double-digit rates since August 2022, when the IRA and CHIPS acts were signed into law; however, construction of computer, electronics, and electrical equipment had already doubled from 2020 to 2021, and again from 2021 to 2022. Spending on computers and electronics doubled again after the legislation took effect, reaching \$100 billion in 2023.

This unusual growth in manufacturing construction is unique to the U.S. among industrial nations. While other countries have seen expansion in the manufacturing center, that growth has been at or below the long-term trend line. In the case of Japan and Germany, construction of manufacturing facilities is currently below the 2019 levels. For the latter, there has been a steadily downward trend in manufacturing facility construction since 2013.

Metropolitan Pittsburgh has not experienced the boom that has been measured nationwide. In part, that is because the sharp increase in manufacturing plant spending has been concentrated on fewer, but larger projects, such as Intel's \$28 billion chip plant north of Columbus, OH. But, there has also been a less competitive environment statewide, and regionally, until recently.

The data on manufacturing employment in the seven-county metropolitan statistical area (MSA) of Pittsburgh shows a clear downward trend since 1990. Beginning with the 2001 recession, each downturn resulted in a lower baseline of manufacturing employment. While the drop in manufacturing employment during the 2001 recession was milder than in subsequent recessions – declining roughly 10 percent by mid-2002 – the decline continued throughout the recovery cycle before the Great Recession. Following the 2009 and 2020 recessions, there was a recovery in manufacturing employment, although at a lower level than before the downturns.

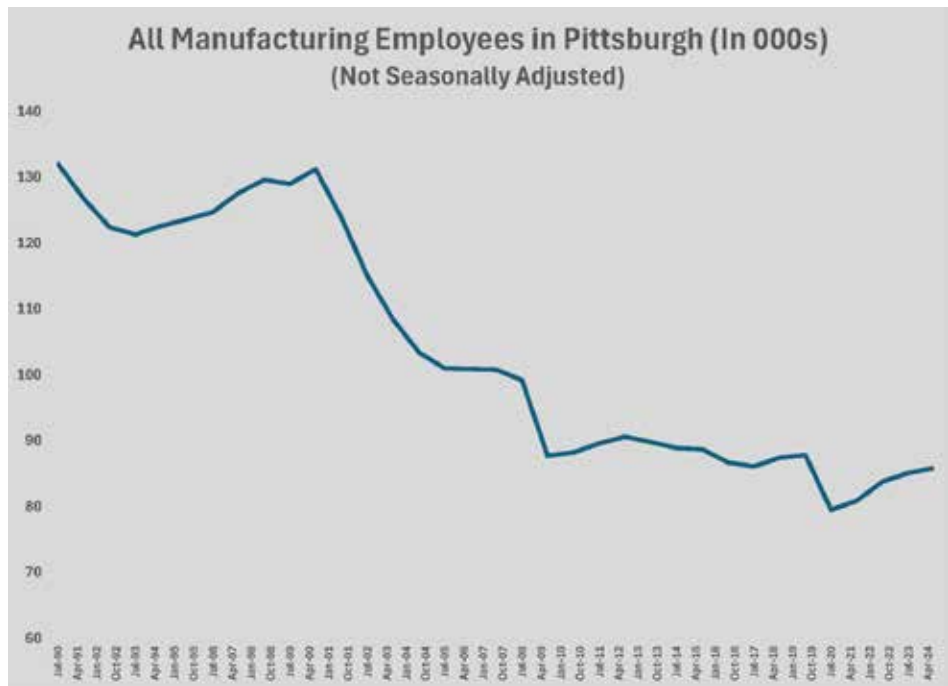
Manufacturing employment in metro Pittsburgh stood at 85,800

workers at mid-year, slightly lower than the pre-pandemic peak of the previous business cycle. That stands in contrast to the peak manufacturing employment year of 1979, which saw 287,000 workers involved in manufacturing in Pittsburgh. By comparison, manufacturing employment nationwide declined by 35 percent during the same period.

“[The job losses] are more a result of large company shutdowns, rather than from automation or productivity gains. The long-term, 20-year plus decline in a factory jobs is aligned with what is going on in the rest of the country,” says Petra Mitchell, president and CEO of Catalyst Connection, a private non-profit consultant for small manufacturers. “There have been some gains in manufacturing employment since COVID. We just completed a survey and almost all survey respondents said they plan to grow their business over the next five years, some significantly.”

New manufacturing plants tend to be the projects that make the biggest splash, but it is the expansion of existing manufacturing facilities that moves the needle the most for both employment and new construction. In July 2024, the Allegheny Conference on Community Development published a research paper, *The Impact of Regional Business Expansion: Why “Growing Our Own” Matters*, that examined business investment from 2007 through 2023, assessing the impact of expansion of existing businesses versus all other investments. Conclusions were easily drawn.

Since 2007, business expansions accounted for 65.1 percent of all investments made in the region. Moreover, that share was very consistent. Investment in existing business expansion varied by no more than five points from the average in only



Manufacturing employment in Pittsburgh has declined steadily over the past 30 years. Source: U.S. Census Bureau, Department of Labor, Federal Reserve Bank of St. Louis.

five of the years measured. During those 17 years, business investments were responsible for 233,954 new or retained jobs, of which 81.8 percent were the result of expansion of existing businesses. Those expansions generated more than \$16 billion in capital expenditures in Western PA. Among those companies having the biggest impact were:

- Eos Energy Enterprises, which began operations in Turtle Creek in 2020 has since announced three expansions as it ramps up production of zinc-based energy storage

solutions. Its most recent announcement in 2023 was one of the largest of the year, with a \$500 million investment in new production capacity eventually resulting in 500 new jobs.

- Washington County titanium manufacturer Perryman Company has made a half dozen expansion announcements since 2007, generating 310 new jobs and \$360 million in CAPEX as it expands its production and administrative capacity locally.

- Elliott Turbomachinery made four investment announcements that added 285 jobs and \$54 million in capital investment in Westmoreland County.
- Steelite, with four announced expansions in Lawrence County, added 150 jobs and CAPEX totaling \$46.5 million.
- Robotics company Seegrid announced plans to add headcount eight separate times, resulting in 297 anticipated new jobs.
- Fayette County technology manufacturer Advanced Acoustic Concepts had five announcements resulting in 76 new jobs and \$17.1 million in CAPEX.

In Butler County, the share of the population that is employed in manufacturing is the highest in the metropolitan statistical area (MSA). Manufacturers employ 11,782 Butler residents, or six percent of the county's population. Manufacturing employees earn \$98,379 annually. That is almost \$23,000 more than the per capita wage in Butler County. Nearly 19,000 Westmoreland residents, or 5.4 percent of its population, are employed by manufacturers. The average annual wage of those workers is \$87,786, more than \$22,000 higher than the per capita wage for the county. In Lawrence County, 4.5 percent of the population is employed in manufacturing, with an average annual wage that is \$32,980 higher than the per capita income of \$50,674.

While those three counties have the highest share of manufacturing employment, the economics play out similarly in all seven counties. Manufacturing employees earn the highest average annual wage, \$103,944, in Beaver County. That is more than \$49,000 more than the per capita income



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for the county. In Allegheny County, which has the highest per capita income in the MSA, manufacturing employees earn \$30,000 a year more. Even in Armstrong and Fayette counties, which have the lowest share of manufacturing employment, manufacturing workers earn \$13,000 and \$25,000 more annually respectively.

Higher wages mean more consumption and derived economic activity, but more manufacturing also means more related economic activity. The ratio of manufacturing output to manufacturing employee in metro Pittsburgh is \$502,000 to one. The ratio of GDP to employee for all industries nationwide is \$128,000. Suppliers, service vendors, restaurants, and retailers see increased activity nearby. Larger manufacturing facilities will create co-location demand from businesses that serve the plant and its workers. Manufacturing plants require ongoing maintenance and renovation. They increase local tax bases. It is why economic development agencies are creating strategies for attracting and retaining manufacturers.

"We wouldn't turn away a warehousing or distribution opportunity but, from the standpoint of Lawrence County Economic Development, the manufacturing jobs come with a higher wage and ultimately our goal is to raise the standard of living in Lawrence County," says Ben Bush, executive director of Forward Lawrence, the unified economic development agency for Lawrence County. "Usually, the tax implications of property that are developed by manufacturers and distribution aren't much different. We would like to see more manufacturing jobs."

"When you look at Penn United, Oberg Industries, or II-VI, the founders of all those companies lived and started their businesses in Butler County. They have kept growing and growing throughout the years," says Joe Saeler, executive director of Community Development Corporation of Butler County. "I give a lot of credit for business growth in the county to our workforce development. Mary Salony and Paul Weifenbaugh, on the Tri-County Workforce Investment Board, do a lot through the Manufacturing Consortium. Paul runs that. They do a lot of hard work seeing what manufacturers need. They have a lot of training dollars from manufacturers. They try to put together business packages to help our manufacturer members."

Salony, executive director/EO officer at Tri-County Workforce Investment Board, explains that her organization's efforts involve several levels of training and promotion, starting with exposing high school students to manufacturers and continuing through on-the-job and advanced skills training. Since 2005, she says the Tri-County Workforce Investment Board has trained over 1,500 workers.

"We do incumbent worker training, where the employers come to us, and we help to improve the skills. Sometimes

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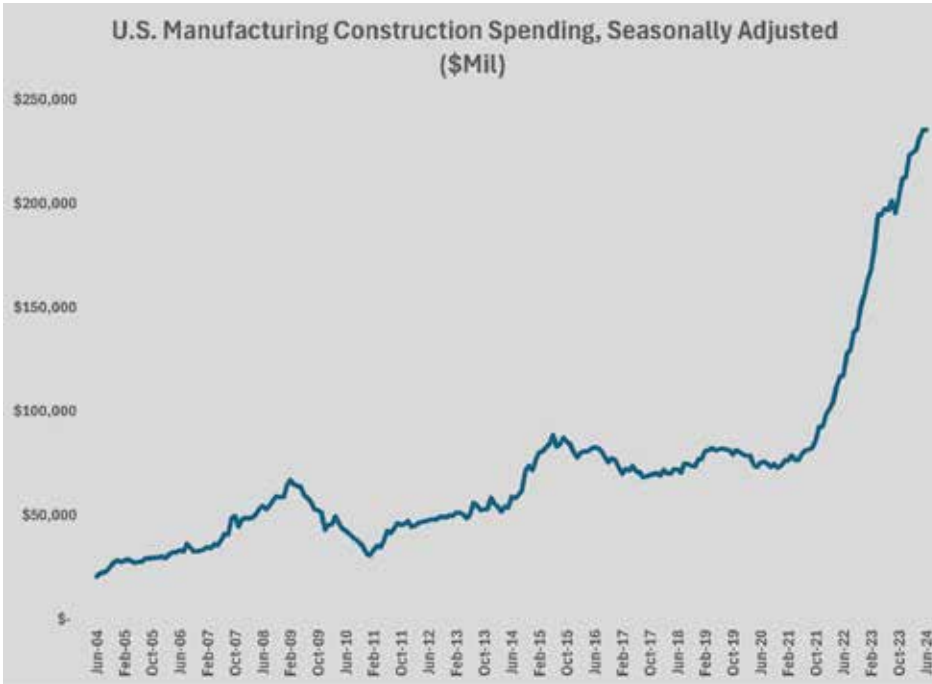
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Source: U.S. Census Bureau, Federal Reserve Bank of St. Louis.

that’s entry level training. Sometimes it’s leadership training so they can promote from within and can hire new people,” Salony says. “We also do a lot of work with the schools to introduce students to manufacturing as a field.”

“We prioritize investment in our assets and our infrastructure to support manufacturing. We have highways and utilities that can support manufacturing projects. We have business and industrial parks that are flourishing with the kinds of manufacturing businesses that we all love to see grow and succeed,” says Jason Rigone, executive director of Westmoreland County Industrial Development Corporation. “Having those sorts of assets available to support growth and attraction positions Westmoreland County well to see those projects locate here.

“We also communicate the message that we want to see manufacturing locate and grow here. Lastly, from a workforce perspective, we continue to invest to ensure that our workforce is skilled and available.”

The Opportunities

The 2010s saw two mega projects in the manufacturing sector in Pittsburgh, the \$1.2 billion new plant for Allegheny Technologies in Brackenridge and the Shell polymers plant outside Monaca. In the years since those projects were under construction, most of the new manufacturing development consisted of smaller projects from smaller manufacturers.

The largest manufacturing projects of 2024 have been expansions. AZEK Inc. expanded its Versatex plant in Aliquippa by 96,500 square feet and Penn United Technologies added 64,000 square feet to its plant in Jefferson Township, outside Sarver, PA. Crane One’s new 38,000 square foot facility and

Samuel & Son’s 80,000 square foot facility, both in Chapman Properties’ Ridge Road Industrial Park in Robinson Township, Washington County, are the largest new manufacturing facilities to get underway in 2024.

Economic development agencies, real estate brokers, and developers are unanimous that the regional environment for manufacturing is on the upswing, with more opportunities to compete for new companies than before. In part, this upswing is a result of the incentive policies, which are weighted towards the energy sector in ways that give Pittsburgh a leg up. There is also the perception that the efforts made to make Pennsylvania more competitive are working.

“There is increased demand. The Buy American provisions, the shift in national attitude towards buying

local and buying American, plus the big investments that the federal government is making are filtering down through the supply chain,” observes Mitchell. “We have 300 companies in the Department of Defense (DOD) supply chain in our region and they can barely keep up with a demand from DOD, let alone their other customers.”

“The sweet spot for southwestern Pennsylvania is this convergence of multiple industries,” says Patty Horvatic, senior vice president of business investment at the Allegheny Conference on Community Development (ACCD). “Are we seeing more projects in advance manufacturing? Yes. Are we seeing more because of Department of Energy funding? Yes. I think we’re seeing more than other regions because we have so many energy communities.”

The Department of Energy (DOE) defines an “energy community” as one which contains a brownfield site, has specific shares of employment or tax revenue from extraction, processing, storage, or distribution of fossil fuels, and an unemployment rate at or above the national average for the previous year. Communities adjacent to such communities also qualify. Projects located in energy communities qualify for a 10 percent energy bonus.

Horvatic shares that through August, nearly 70 percent of the opportunities that have come through the ACCD office have been advanced manufacturing in some form. That is almost 15 percentage points higher than the share of manufacturing opportunities in 2023 and 30 percentage points higher than the five-year average of 40 percent manufacturing opportunities.

“There are a couple of companies in the market. One would

be a plant relocation from another state and there are a couple of other prospects looking at Pennsylvania coming from other states. It's too early to say that it's a trend, but there are people looking," says Louis Oliva, executive managing director for Newmark. "When you look at all the Governor's Action Team inquiries, there are a lot in the alternative energy sector, whether it's batteries or solar."

"We are seeing an uptick in activity. It is more on the smaller side but we're seeing things happen," says Tim White, senior vice president of business development and strategy at RIDC. "There are a lot of people evaluating manufacturing tied into one of the DOE programs, particularly everything to do with energy and electricity, from equipment that goes into the grid to generation and storage. We're getting looks in Western PA at all those."

White expresses optimism about the role the Commonwealth of Pennsylvania is playing, an optimism he was not feeling until recently.

"The commonwealth is responding better than they have in a long time. We haven't gotten any across the finish line yet, but we'll see how the next six months to a year play out," he says. "Two years ago, we were losing them all. Now we're competing."

Governor Shapiro made improving Pennsylvania's competitive position for business a top priority of his administration from the earliest days. Justin Belyus, business marketing director for the Department of Community and Economic Development, highlights the early accomplishments of the administration.

"Governor Shapiro and his administration have worked aggressively to make PA a leader in economic development. Just last year, the governor created the first economic development strategy for PA in almost 20 years and the new budget delivers on key elements of that strategy," she says.

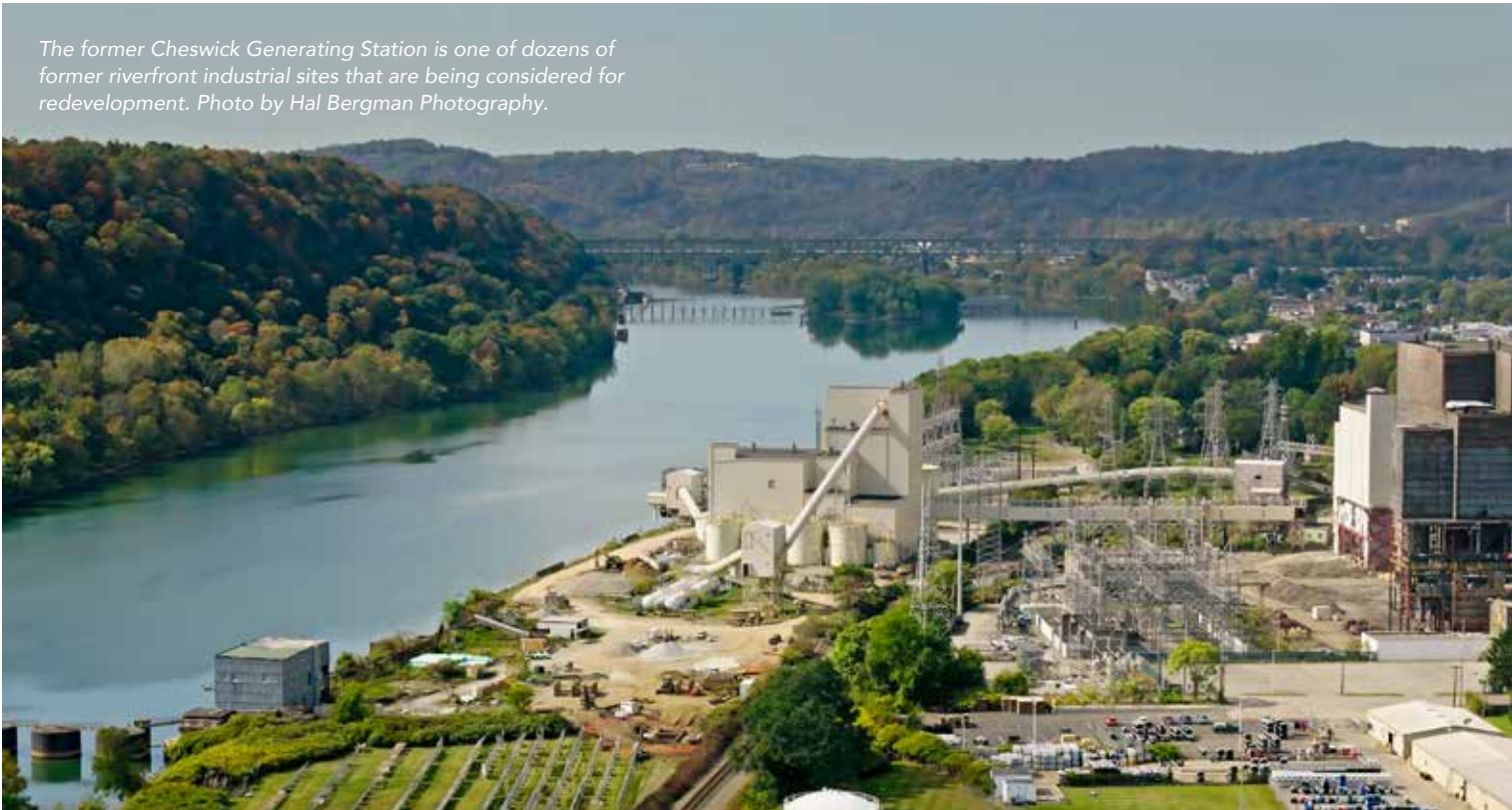
Belyus points to the bipartisan support for the \$500 million budget appropriation for development of industrial and manufacturing sites, including the \$400 PA SITES Program. The first grant for Western PA is a \$2.5 million investment to develop a new industrial park in Hempfield Township. She also called out the Streamlining Permits for Economic Expansion and Development (SPEED) program, which was introduced in July.

"I would say 40 percent of the requests for proposals we receive are manufacturing. There is probably another 20 percent that are 'other' kinds of industrial projects, like data centers or solar, that are like manufacturing," reports Bush.

Bush, like almost all of his peers, says the lack of sites appropriate for manufacturing is his county's number one problem. He says Lawrence County is conducting an industrial sites assessment to expand the inventory. One major project that is under construction now is the redevelopment of the former Stonecrest Golf Course near Wampum, PA.

"We have been working with LaCarte Enterprises on Stonecrest Business Park. When it's fully developed, Stonecrest will allow us to have around 1.5 million square feet of industrial space under roof on four different development sites. One site will be able to handle a million-plus square feet," Bush says.

The former Cheswick Generating Station is one of dozens of former riverfront industrial sites that are being considered for redevelopment. Photo by Hal Bergman Photography.



If there were a million-square-foot user in the market, it is likely that it would be an energy-related business. The largest manufacturing project under construction in the Tri-state area is the Form Energy battery plant that Massaro Corporation is building in Weirton. Other large-scale sites or users are also leaning towards that sector.

Charah Environmental Redevelopment Group (CERG) acquired three sites formerly owned by GenOn at the Cheswick Generating Station. CERG demolished the station and the surrounding related facilities and is remediating the site, which includes approximately 265 acres along the Allegheny River. A buyer for the property is in the midst of due diligence. Assuming there are no hiccups discovered during due diligence, an announcement of an energy-related redevelopment of the Cheswick property is expected near the end of 2024.

The biggest splash made by the IRA and DOE to date has been the competition and funding for hydrogen hubs. Hydrogen is viewed as a potential for large-scale energy production that is not dependent on fossil fuels, although the most accessible hydrogen projects at the moment are the so-called “blue hydrogen” plants that will use natural gas as a feed source. In October 2023, a Morgantown-based team representing the Appalachian region, known as ARCH2, was selected as one of the developers for a hydrogen hub, making ARCH2 eligible for up to \$925 million in federal funding.

There are, however, mountains of federal requirements and rules governing the development, some of which conflict with each other or how the market operates. Melanie White, director of strategic engagement with Allegheny Science and Technology who is leading community engagement efforts for the hub, explains that construction of the earliest facilities is still well down the road.

“Based on the phased timeline for H2 programs overall, the proposed ARCH2 projects will not be entering construction

phase for at least three or four years,” White explains. “While ARCH2’s proposed projects will not all progress at the same pace, no construction can begin until the gating criteria for phases one and two (i.e., permitting, regulatory, community engagement) are met.”

Using the current timeline, it will be six to eight years before the earliest of the hydrogen-related facilities are built and operating. ARCH2 expects project planning to last through most of 2025, with two to three years of project development to follow before construction. That, of course, assumes no national energy or economic development policy changes, no organized opposition at a regional project site, nor significant market changes that would impact the economic viability of the hydrogen hub.

The other mega project that will depend upon favorable policy and regional support is the billion-dollar-plus capital improvements at the Mon Valley Works, promised by Nippon Steel. That project, which already has some preconstruction activities underway, requires merger approval and a smoother regulatory process than the ill-fated investments proposed by US Steel a decade ago

The bulk of the regional construction opportunities in 2025-2026 seem likely to come from existing manufacturers. To get more growth in opportunities, more companies from outside the region will need to choose to locate in Western PA. There are still obstacles to business attraction to be overcome.

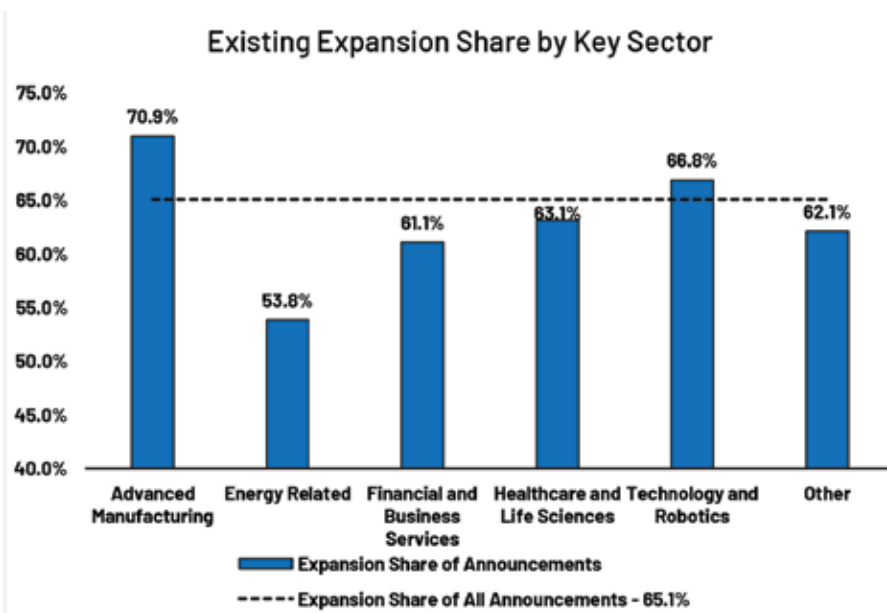
The Obstacles

The substantive change in philosophy the commonwealth has recently adopted towards business attraction highlights an unpleasant truth: Pennsylvania is less friendly to business than many of its neighbors. There is a history of tension between business and government, a pendulum of differences about tax revenues, regulation, labor practices, and the environment. Without addressing the argument about where the pendulum is traveling in 2024, it is objectively true that there are obstacles that push manufacturers to choose sites in places other than Pennsylvania.

“The primary reason we lose manufacturing projects is lack of sites. That could be a lack of sites that are pad ready or a lack of infrastructure,” says Horvatic. “We are excited about the \$500 million for sites in this year’s budget. That’s good for the entire commonwealth but it will be especially good for construction and real estate.”

Even though Saeler points to workforce development success as a reason there is a higher share of manufacturing employment in Butler County, he admits that the pipeline could be fuller.

“Most of the activity we’re seeing is



Source: *The Impact of Regional Business Expansion: Why “Growing Our Own” Matters*, Allegheny Conference on Community Development.

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expansion projects from small manufacturers. The limiting factor is the labor force," he says.

Tim White reports that Re:Build Manufacturing, one of the regional successes of 2023, has experienced similar limitations.

"The first phase at New Kensington Advanced Manufacturing Park is complete and they're working on their expansion area and hiring people," he says. "Like every other company they're finding challenges in the hiring environment right now."

Another structural problem is the electrical infrastructure. Adequate power has long been considered one of the region's advantages, but there are significant issues with the infrastructure that make business attraction challenging.

"The story hasn't changed. A lot of the manufacturing opportunities turn on the utility infrastructure," says Oliva. "Can we provide this higher electrical service in a timely fashion?"

"The ability of a single site to get a large amount of electricity - and I mean something over 10 or 20 megawatts - is very difficult and very time-consuming," says Jamie White, president and CEO of LLI Engineering. "The rate and distribution structure puts our region at a competitive disadvantage to Ohio or even Virginia. And Virginia gets much of its power from Pennsylvania!"

"Power is at a premium. Because we have these legacy sites

that have the infrastructure there, it is assumed that it's easy to get power here," Horvatic says. "Pennsylvania is an exporter of power but the distribution to local sites needs to be improved."

"Generally speaking, the infrastructure is there on a regional basis for large power. There's not a generation issue but getting the power to these newer greenfield sites is always problematic. That's where a lot of these 25,000 to 50,000 square foot new buildings are going," says Nate Phillips, construction manager at Chapman Properties. "As they go to greenfield sites they have denser power requirements. There are still issues with post-pandemic supply chain problems for electrical equipment, but it is really the distribution that is the issue. Duquesne Light made a huge investment in the Westport area, but it is still underserved."

Zachary Merritt, general manager, business services at Duquesne Light, is part of a business unit that was formed in 2021 to meet the challenges that were arising because of supply chain issues. He says that lead times on heavy equipment, like transformers, went from 20 to 24 weeks to 14 to 18 months after the pandemic. Merritt's group is working with developers to try to engage earlier in the planning process because of the extensive process required to extend distribution.

"In the light manufacturing sector, say one to three megawatts, our largest delay has been the construction and delivery

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Construction has been completed on the first phase of the New Kensington Advanced Manufacturing Park, which is being occupied by Re:Build Manufacturing. Photo courtesy RIDC.



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of transformers," Merritt says. "For new distribution, the driver of the timeline is the detailed amount of design, permitting, permission, and then construction that has to occur."

"Chapman's project in Washington County is a good example. That is in the 60-megawatt neighborhood, so it requires a transmission line for service," Merritt continues. "We have to apply to the Pennsylvania Utility Commission [PUC], state the need and present reasonable alternatives. There are open public comment periods when anyone can state their opposition. We have to respond to those and eventually go through a process where the PUC approves or denies it. That takes two to three years. Those timelines have not changed since I joined Duquesne Light in 2016."

In addition to the PUC, new distribution must be reviewed and approved by PJM, which is the regional transmission organization for the 13 states, including Pennsylvania. At present, the backlog of applications takes two years to complete.

Merritt notes that there has been an unheard-of uptick in large power needs in recent years, driven largely by the explosive growth in data centers, particularly AI data centers.

"We're getting power request numbers no one has seen before. I routinely get requests for up to 300 megawatts to be delivered in a month. That's how much a third of a nuclear reactor generates," Merritt laughs. "The scale of what is being asked has not been seen before and the pace at which people expect the power to be delivered is phenomenal. It's not how the American grid was designed."

Jamie White sees the limitations of the grid and the public utility process as an opportunity for a different solution. His firm designed the combined heat and power (CHP) facilities at Pittsburgh International Airport and the AHN Wexford Hospital. Those facilities use on-site natural gas reserves to drive turbines for electricity generation and to heat the property.

"The solution is to have the distribution and power generation and in one place," White concludes.

For Ben Bush, Ohio is a big problem. But, while he would like to see Pennsylvania come



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|------------------------------------|---------------|-----------------|----------------|------------------|
| | # Employees | % of Population | Output (\$Mil) | Average wage |
| Allegheny | 36,861 | 3.0% | \$ 21,600 | \$ 100,949 |
| Armstrong | 1,660 | 2.6% | \$ 567 | \$ 67,139 |
| Beaver | 6,536 | 3.9% | \$ 675 | \$ 103,944 |
| Butler | 11,782 | 6.0% | \$ 6,570 | \$ 98,379 |
| Fayette | 3,699 | 2.9% | \$ 1,450 | \$ 73,940 |
| Lawrence | 3,822 | 4.5% | \$ 2,130 | \$ 83,654 |
| Washington | 8,567 | 4.1% | \$ 4,080 | \$ 89,048 |
| Westmoreland | 18,947 | 5.4% | \$ 9,040 | \$ 87,786 |
| Total MSA | 91,874 | | 46,112 | \$ 88,105 |

Source: PA Department of Labor and Industry.

up with incentives that compete with those Jobs Ohio offers, he talks more about reforming the permitting process, including a change in attitude. Bush advocates for reducing review times, creating a "deemed approved" designation for projects that exceed the time the agency is expected to take for review, and disincentives for third-party appeals to permit reviews.

"The SPEED program is a great start, but we need to change the way we think about our businesses," Bush recalls. "When it takes 120 business days to get an NPDES in PA and Ohio can turn that around in less than 90 calendar days, we are at a real disadvantage. Speed to market is imperative and I can't blame a business owner who doesn't want to wait."

Rich Gasperini, principal at Genfor Real Estate, cites permitting problems as the obstacle he would most like to see fixed.

"Most industrial users that are going to undertake a big project view West Virginia and Ohio as much more reliable for the speed of getting a permit, or the risk of getting approved. It's risk mitigation to be in one of those two states instead of Pennsylvania," Gasperini says. "That is the perception among big manufacturing users. The governor of Arkansas joked that it took US Steel less time to build its new plant there than it would have taken to get a permit in Pennsylvania."

For all the talk about Ohio, West Virginia is an equally formidable competitor when it comes to incentives and cooperation for business attraction. West Virginia Economic Development Authority allocated \$75 million towards the purchase of the land for Form Energy. Governor Jim Justice and the West Virginia legislature worked with federal agencies to come up with another \$215 million in incentives and financing for the project, which is expected to result in a plant that employs 750 people.

West Virginia has earned a reputation for responsiveness that pairs with its more

favorable business climate overall. Governor Justice has pushed for both incentives and more tangible action, like the unplanned construction of interstate highway interchanges to support the expansion of industrial parks and manufacturing sites.

Being "open for business" may be a breath of fresh air for those operating in Pennsylvania, but it is a minimum expectation for companies considering the commonwealth from another state. The Shapiro administration must build on the early bipartisan

initiatives to raise Pennsylvania's competitiveness. And it could use a few wins.

"Most of the projects getting federal incentives are also going for some state-level incentives. Generally, those are site infrastructure investments from the state or a job creation tax abatement," says Tim White. "We have the site money lined up now, which will fill a big hole. The commonwealth still needs to work on a package that will compete on the tax incentive side. Outcomes matter. No one gets paid commission for potential deals." **BC**



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PROJECT PROFILE

UNIVERSITY OF PITTSBURGH CENTRAL UTILITY BUILDING



Perryman's new forging facility. Photo by Stevens Engineers and Constructors.

There is a saying that describes the more hectic nature of construction that could probably apply to most design-build projects, that it is like trying to design the plane while you're flying it. Stevens Engineers and Constructors (Stevens) is accustomed to projects that unfold like that saying. It completed a major new forging facility for Perryman Company earlier this year that made the best of designing while flying.

Perryman Company is a manufacturer of titanium products based in Houston, PA. Founded in 1988, Perryman has been growing more rapidly in recent years, and built new facilities for melting and forging in Western PA. In mid-2022, Perryman engaged Stevens to build new forging facilities in Chartiers Township, Washington County. Stevens was hired to provide design-build services for a new building and an addition to the bar shop and brought in its subsidiary, CDMG, to do the engineering and design.

"This is the largest building Perryman ever built. We needed to step up in size of contractors and Stevens fit that bill. We

felt strongly that we needed a local presence, and we needed someone on this project that could handle both the construction and the design engineering at the same time," explains Jason Julius, chief financial officer at Perryman, who was director of operations at the time of the project. "When we awarded the project, we awarded the building structure but did not have the civil engineering design completed for the equipment, and it is extensive. We wanted to have one place to go to the design and execute the design."

"One of our people had a relationship with the Perryman Company. They asked us to look at the project without a formal request for proposal," recalls Dan Moore, project manager for Stevens. "We presented them with a proposal and construction estimate that met their needs. There were a lot of unknowns at the time."

Among the things that were unknown was the schedule. Perryman had ordered the building, which had a six-month lead time, with the goal of completing construction in June 2024. At the time Stevens began construction in October 2022, however,



Foundations for the manufacturing equipment required major changes to the building foundations as construction was underway. Photo by Stevens Engineers and Constructors.

the manufacturing equipment orders, and engineering were not completed. That was a significant unknown that would have to be figured out as construction proceeded.

“We had the building design and foundations and then we were awarded the contract for the equipment foundations,” Moore says. “The building was already purchased, and we had six months until delivery. Initially, we just had a blank slate for the building, and they gave us equipment foundations three months later. We had to work closely with engineering and SMS to revise the foundation design.”

Moore explains that the requirements for the equipment foundations were unrelated to the pre-engineered steel structure for the forging facility, but the size and nature of the equipment

foundations altered the building’s foundation, nonetheless. That included unusual angles, elevated slabs, and substantial amounts of embedded metals throughout the foundations.

“The people who were doing the structural design for the buildings were not the people doing the design for the equipment foundations. There was a center column in the building because it is so wide. When they bought the equipment the people who laid it out did not account for the center columns,” recalls Mark Price, president of CDMG. “We told them where the columns were and they missed the columns with their layout, but the footings for the columns were as much as eight feet by eight feet. The adjacent equipment pits were 20 to 30 feet deep. Those pits would have undercut the column footing, which may have been three feet deep. We had to lower the column footings by 20 feet or more and then avoid the equipment foundations.”

“We had to move some elements of the foundations, like the piers, to accommodate the equipment foundations. Some of the piers had to be lengthened by 25 feet to properly interface with the equipment pits,” he says. “We were pouring piers within a week of their being designed. It was fast moving. We knew things were going to happen that way, so we anticipated it with our planning. We had material and, because we were working with CDMG, when that final design came, we were able to jump on it.”

“There were pilings that we completed design on Tuesday and Stevens was putting in the ground on Thursday. That’s an unusual turnaround,” Price says. “You design from top down, but you build from the ground up. Until you start getting footings in, nothing else can get done.”

To keep on schedule, the building was erected while the work on the equipment foundations was ongoing. This required substantial coordination between building and foundation crews to move lifts and to delay work in the equipment pits when overhead work was taking place. Stevens also further accelerated the building delivery schedule, taking advantage of a coinciding Perryman project in another location.

"At first, we were going to get a hundred tons per week from the building manufacturer and then we convinced them to deliver 200 tons per week in order for us to keep up with our schedule," Moore explains. "We also sold another Nucor building to Perryman at their California site. It was supposed to be delivered at the same time, but the California project was delayed by four months so that we could put all our efforts on this building to get it completed."

Julius notes that the form of the contracts allowed for that kind of flexibility, noting that the manufacturing equipment was being built at various facilities around the world. He says the traditional design-bid-build approach, which often leads to conflict and longer lead times, would not have worked as well on the forging building.

"The building contract was a fixed price, but the rest of the contracts were on a not-to-exceed basis. We and Stevens shared the profit and pain after that," says Julius. "We had to be that flexible to get the project completed on time."

Perryman Company was an active construction owner, holding the contracts for numerous related specialty contractors – including the electrical subcontractor – with which Stevens needed to coordinate activities. Weekly meetings were held with Perryman and the specialty contractors to review planned activities and resolve concerns.

Stevens conducted daily meetings with the crafts to review activities and safety procedures. Given the tight schedule and mix of specialty contractors and equipment installers, trades were regularly working in close proximity. Moore notes that the excavation was especially difficult because of the shoring needed to protect existing Perryman facilities. Safety training on deep excavation and shoring was conducted in addition to the daily safety meetings. Stevens was able to complete work totaling 145,339 labor hours without any lost time incidents.

Stevens' work at the site involved four separate projects, with a scope of work that included the new 160,000 square foot forging facility (plus a 12,110 square foot mezzanine), an 18,700 square foot expansion of Perryman's bar shop, the



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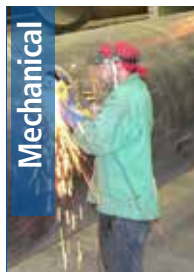


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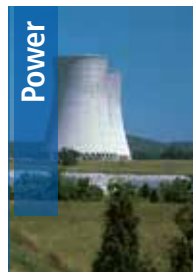
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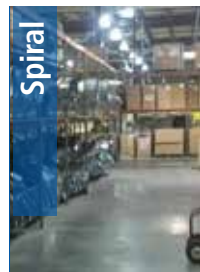
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foundations for the forging equipment, and the installation of specialty capital equipment. The project wrapped up in June 2024 as scheduled.

“Communication made the project successful. The communication between the engineers and the construction team was daily or hourly,” Moore says. “There was no heartache about working together between union and non-union contractors because we all had enough to do so that we could get the project done on time. Teamwork and communication were the keys to the project.”

Price notes that enhanced communication is one of the benefits of delivering a project by design-build, especially with a firm that can handle both sides of the coin.

“CDMG and Stevens are part of one unit, just different divisions. Dan works across the hall from me. The building group is down the hall from me. Engineering is downstairs. That was a big factor in the success of the project,” Price says.

“Equally important was the way Perryman trusted us and allowed us to do what was necessary. We were working on something that we didn’t quite know what the cost was going to be,” he continues. “Some owners would worry that we would charge them whatever we wanted. Of course, we open our books but there is a level of trust that has to be there for the project to go at that speed. More than once throughout the job, Jim Perryman would say that we will be fair to each other as we have throughout this whole project. You don’t always have that.”

“We could drive 10 minutes to be in their office or pick up the phone and they could be at the site in 10 minutes. That’s why the project was successful,” agrees Julius. “During the year and a half we worked together on the project, we never put our tools down to argue about who was paying for something or whose fault it was. We just kept working and moving towards a solution. At the end of the day that stuff can be worked out amicably across the table.” **EG**

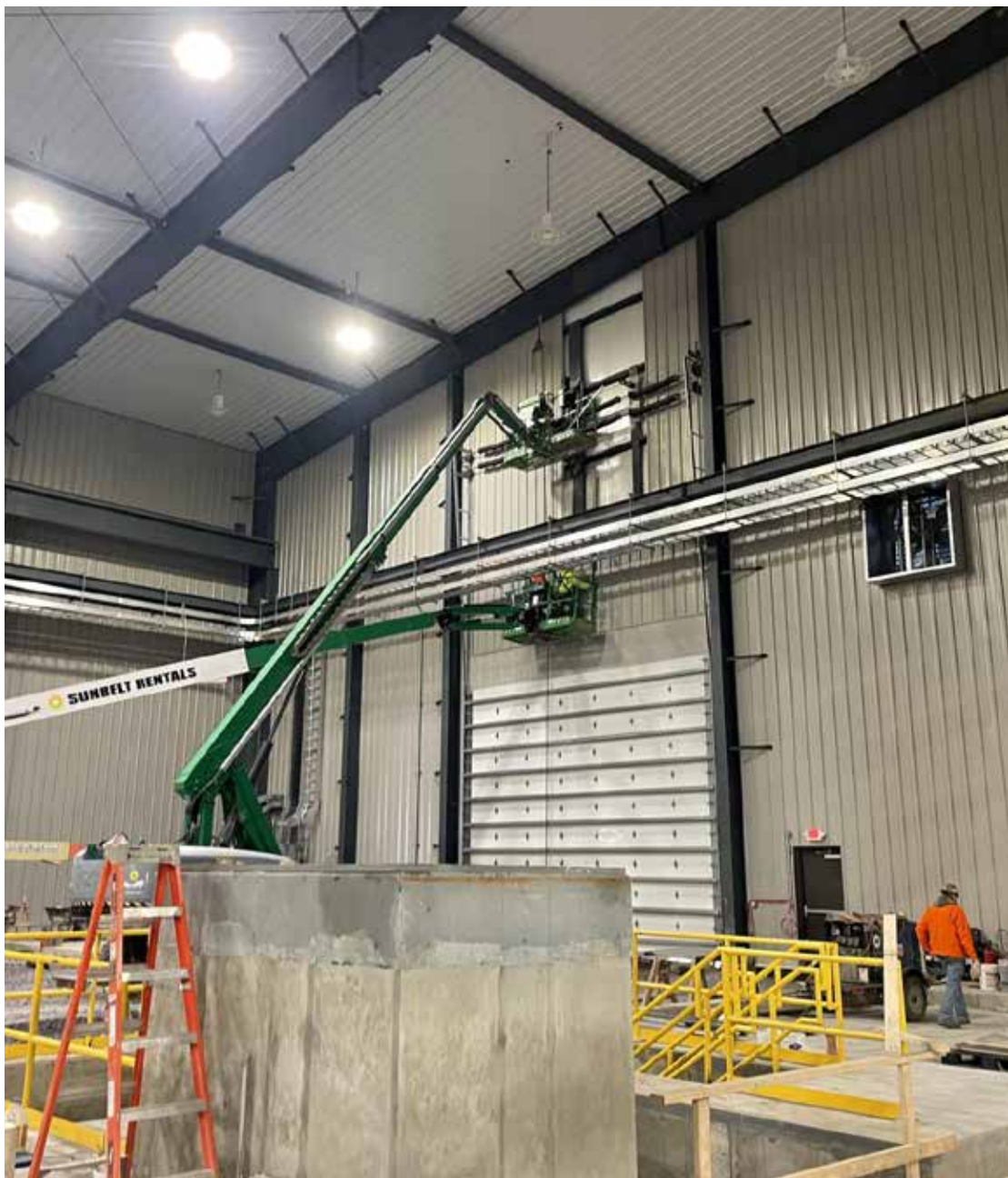


Photo by Stevens Engineers and Constructors.

PROJECT TEAM

- | | |
|--------------------------------------|---|
| STEVENS Engineers & Constructors | Prime Contractor |
| Perryman Company | Owner |
| CDMG | Design Engineer |
| Nicholson Construction/Grout Systems | Foundations |
| 3G Metals | Forging Facility Roofing and Insulation |
| Engineered Products Inc. (EPI) | Miscellaneous Metals |
| SSM Industries | HVAC |
| Warren Door | Overhead Doors |

LEGAL PERSPECTIVE

FINALLY - A DE MINIMIS EXEMPTION FOR BUY AMERICA

BY JENNIFER BUDD AND LISA WAMPLER

In November 2021, Congress passed the bipartisan Infrastructure Investment and Jobs Act (IIJA), pledging to invest \$1 trillion into new infrastructure nationwide.

For more than 40 years, the Build America Buy America Act (Buy America) has required contractors to domestically source iron, steel and other manufactured products incorporated into certain federal-aid highway and transit projects. When the IIJA was passed, one key question remained unanswered: how would domestic sourcing requirements, such as Buy America, be incorporated? Finally, in August 2023, the Made in America Office (MIAO), a component of the White House Office of Management and Budget, provided clarity on the issue. The new guidance from MIAO explains that the IIJA expands traditional Buy America requirements and also provides new insight into the exceptions and exemptions available to contractors.

Capitalizing on the de minimis exemption will help relieve costs and schedule concerns.

One critical aspect of the IIJA is that it expands domestic sourcing

requirements to "construction materials." Until the latest MIAO guidance, it was unclear which types of construction materials are subject to the requirements. Now, we have the answer. For purposes of the IIJA, "construction materials" means articles, materials or supplies that consist of one or more of the following:

1. Non-ferrous metals;
2. Plastic and polymer-based products (including polyvinylchloride, composite building materials, and polymers used in fiber optic cables);
3. Glass (including optic glass);
4. Fiber optic cable (including drop cable);
5. Optical fiber;
6. Lumber;
7. Engineered wood; and
8. Drywall

The expansion of domestic sourcing requirements will undoubtedly cause contractors concern. Having to source each of these materials can be both onerous and expensive, or in some cases, nearly impossible.

One criticism from the industry has been that domestic sourcing requirements can delay projects. This is especially frustrating when the quantity of product is quite small (i.e. a change order that requires a few hundred dollars' worth of lumber that might take weeks or months to procure domestically, but the lumber is otherwise widely available at hardware stores and suppliers). Thankfully, the MIAO's new guidance provides for a de minimis exemption that completely relieves contractors of domestic sourcing requirements in two instances.

De Minimis Exemption

The non-discretionary de minimis exemption absolutely excuses contractors from domestic sourcing requirements on IIJA projects under two circumstances: (1) when total federal funding on the project does not exceed \$500,000; and (2) when "non-compliant" products total \$1,000,000 or 5 percent of the project's total applicable costs, whichever is less. For exemption purposes, a project's "total applicable costs" includes the cost of all materials and manufactured products subject to Buy America requirements, minus iron and steel.

While not perfect, the de minimis exemption is helpful. It allows contractors to evaluate and prioritize aspects of procurement that will provide the most financial benefit or acceleration of the project schedule. It will also help prevent major delays for negligible quantity additions or additional work. However, the formula to determine if the material meets the second definition of de minimis is complex, and contractors will have to take care in calculating it.

Conclusion

Unfortunately, Buy America remains a complicated obligation to fulfill, with large implications for non-compliance, such as delayed or denied payments or, in the most severe circumstances, allegations regarding false claims, which may lead to debarment. Capitalizing on the de minimis exemption will help relieve costs and schedule concerns. **EG**

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FINANCIAL PERSPECTIVE

THE SYNERGY OF LEADERSHIP: CEO AND CFO COLLABORATION IN A FAMILY-OWNED CONSTRUCTION COMPANY

BY TED PETTKO, CPA

In the dynamic and competitive world of family-owned construction companies, the collaboration between the chief executive officer (CEO) and the chief financial officer (CFO) is crucial for achieving financial stability and sustainable growth. This partnership transcends mere number-crunching; it involves steering the company towards a prosperous future while honoring the legacy and values of the family business. Let's delve deeper into how these two pivotal roles can work together effectively to drive success.

Vision and Strategy Alignment

CEO's Role: The CEO is the visionary leader, responsible for setting the strategic direction of the company. In a family-owned construction business, this often involves balancing tradition with innovation. The CEO must ensure that the company's long-term goals align with the family's values and legacy. This includes fostering a culture that respects the past while embracing new opportunities and technologies that can propel the business forward.

CFO's Role: The CFO translates the CEO's vision into financial terms. They provide the financial insights and data necessary to support strategic decisions. By working closely with the CEO, the CFO ensures that the financial strategy aligns with the overall business strategy, enabling informed decision-making. This collaboration helps in creating a cohesive plan that integrates financial prudence with strategic ambition.

Financial Planning and Risk Management

CEO's Role: The CEO must be acutely aware of the financial health of the company to make strategic decisions. This includes understanding the financial implications of new projects, expansions, or investments. The CEO relies on the CFO to provide accurate and timely financial information, which is critical for making informed decisions that will benefit the company in the long run.

CFO's Role: The CFO is responsible for financial planning, budgeting, and risk management. They must identify potential financial risks and develop strategies to mitigate them. By collaborating with the CEO, the CFO ensures that financial risks are managed proactively, and opportunities are seized effectively. This proactive approach helps in safeguarding the company's financial health and ensuring that it is well-prepared to face any economic challenges.

Communication and Transparency

CEO's Role: Effective communication is crucial in a

family-owned business. The CEO must communicate the company's financial goals and performance to family members, employees, and stakeholders. This transparency builds trust and ensures everyone is aligned with the company's objectives. Open communication channels also help in addressing any concerns or misunderstandings promptly, fostering a harmonious work environment.

CFO's Role: The CFO plays a key role in maintaining financial transparency. They must present financial data in a clear and understandable manner, ensuring that all stakeholders have a realistic view of the company's financial position. This transparency is essential for making informed decisions and maintaining trust within the family and the business. The CFO's ability to demystify complex financial information and present it in an accessible way is invaluable in building confidence among stakeholders.

The collaboration between the CEO and CFO in a family-owned construction company is essential for financial success and sustainability. By aligning their roles and working together, they can navigate the complexities of the construction industry, honor the family legacy, and drive the company towards a prosperous future.

Innovation and Growth

CEO's Role: The CEO drives innovation and growth, looking for new opportunities to expand the business. In the construction industry, this could mean exploring new markets, adopting new technologies, or diversifying services. The CEO must ensure that these initiatives are financially viable and align with the company's strategic goals. By fostering

a culture of innovation, the CEO can help the company stay competitive and relevant in a rapidly changing industry.

CFO's Role: The CFO evaluates the financial feasibility of growth initiatives. They analyze the potential return on investment and ensure that the company has the financial resources to support growth. By working together, the CEO and CFO can pursue innovative projects that drive the company forward while maintaining financial stability. This collaboration ensures that growth initiatives are not only ambitious but also grounded in financial reality.

Succession Planning

CEO's Role: Succession planning is critical in family-owned businesses. The CEO must ensure that there is a clear plan for leadership transition to maintain continuity. This involves identifying and preparing future leaders within the family or the company. A well-thought-out succession plan helps in preserving the company's legacy and ensures that it continues to thrive under new leadership.

CFO's Role: The CFO supports succession planning by ensuring that the financial aspects of the transition are well-managed. This includes evaluating the financial impact of leadership changes and ensuring that the company remains financially stable during the transition. The CFO's role in succession planning is crucial in providing a smooth and seamless transition that minimizes disruptions to the business.

Conclusion

The collaboration between the CEO and CFO in a family-owned construction company is essential for financial success and sustainability. By aligning their roles and working together, they can navigate the complexities of the construction industry, honor the family legacy, and drive the company towards a prosperous future. This synergy of leadership not only strengthens the financial foundation of the company but also fosters a culture of trust, transparency, and innovation. In an industry where both tradition and innovation play vital roles, the combined efforts of the CEO and CFO can ensure that the company remains resilient, competitive, and poised for long-term success. **BG**

Ted Pettko has been a CPA at Schneider Downs since 1997 and has served as a member of the Schneider Downs Board of Directors since 2016. He is an audit shareholder and serves as the leader of Schneider Downs' Construction Industry Group. He can be reached at tpettko@schneiderdowns.com.

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BEST PRACTICE

ADDRESSING BEHAVIORAL HEALTH AND SUICIDE IN THE CONSTRUCTION INDUSTRY

BY RICHARD JONES AND BRIDGET KELLY

Over the past 25 years our country has experienced one of the most consequential and protracted public health crises in the history of mankind.

This crisis goes well beyond the “opioid epidemic” and touches nearly every aspect of our lives. The term “deaths of despair” has been used to describe this behavioral health apocalypse, and the numbers are deeply troubling. Deaths of despair encompass suicides, unintentional overdoses, and death caused by chronic alcohol misuse.

Unfortunately, this number has grown exponentially over the decades escalating to record numbers over the past several years. Furthermore, deaths of despair have impacted blue collar workers in a disproportionate manner. A headline in STAT news captures this stark reality: “Deaths of despair: the unrecognized tragedy of working-class immersion” (www.statnews.com/2021/12/29/deaths-of-despair-unrecognized-tragedy-working-class-immersion/). The construction industry has been hit especially hard by these deaths of despair – and unfortunately, the situation appears to be getting worse.

Grim Construction Statistics

Studies by the Centers for Disease Control (CDC) show that construction has the highest rate of overdose deaths, and the second highest rate of suicides compared to all other U.S. industries. The truth is these construction numbers are astronomical when compared to the general population. Three statistics stand-out:

- Construction workers are 133 percent more likely to die of an overdose. 162.2 construction workers (per 100,000) died by unintentional overdose, compared to 32.4 per 100,000 for the general population.
- Construction workers are 117 percent more likely to die of suicide. 53.3 construction workers (per 100,000) died by suicide, compared to 14.0 per 100,000 for the general population.
- Construction workers are 183 percent more likely to die from suicide or overdose compared to all other job-related fatalities combined, according to the CDC, which reported there were 53.3 deaths by suicide compared to 9.4 per 100,000 for all other fatalities combined.

Why the construction industry?

Several factors have contributed to this behavioral health crisis.

Construction is a tough job both physically and mentally. Physically, there are more opportunities for workers to be injured than in other jobs. Muscle and bone injuries are common,

and doctors often prescribe opioids for pain management. Opioids are highly addictive, and even prescribed use can very quickly escalate into misuse or an opioid use disorder. Some studies suggest that a person can experience withdrawal after only five days of prescribed use (CDC, 2017). In addition, the psychological dependency associated with opioid use disorder is overwhelming. Many times, the worker is taken by surprise in terms of “becoming addicted.”

Mentally, construction work has typically valued a “tough guy” mentality. In addition to stressful life factors with cyclical work, employees may push themselves to work even when they’re not mentally or physically ready.

Additionally, construction workers often do not have paid sick leave; if they don’t work, they don’t get paid. This too, can add to the pressure to work regardless of their health. In general, toughness is prized in the construction industry. It’s what gets the job done. But it can also prevent the people who need help from seeking support out of fear of being seen as weak or getting passed over for the next job.

There is also considerable stigma – not just in construction but in the United States in general – around having a mental health or substance use issue. It’s seen as a moral failing or character flaw instead of a disease or something that needs support to be properly addressed.

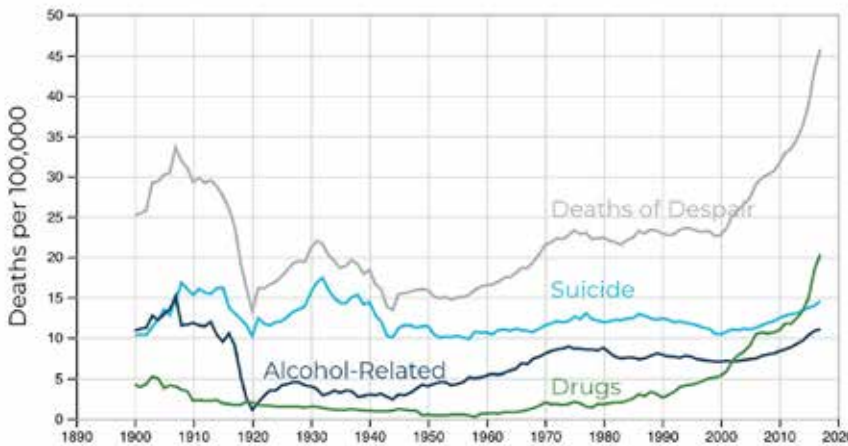
What Can You Do About It?

The other noteworthy statistic is the overall engagement rate for behavioral health. The overwhelming majority of people struggling with mental health or substance misuse issues never even get help for their condition. Most people simply go on to the bitter ends, suffering in silence. For example, in 2022 only 6 percent of people with a substance use disorder (SUD) received any type of help for their SUD.

People get better if they get help; for example, a 2018 analysis by the Recovery Research Institute at Harvard found 75 percent remission rates for individuals who engaged in at least six months of “help.” Interestingly, it didn’t even matter what type of help was sought, regardless of the recovery pathway, 75 percent got healthy. Visit www.recoveryanswers.org for more information.

The good news is that employers can impact employee behavioral health by positively impacting this engagement. Employers can help to destigmatize behavioral health issues by holding open discussions and promoting psychological safety. Leadership can impact the process substantially via mandatory training on behavioral health and assertive engagement strategies.

Furthermore, leadership can impact outcomes by sharing their own struggles when applicable and appropriate.



Source: Center for Disease Control, California Constructor.

Leadership can embrace a “we are all in this together attitude” and challenge the tough guy, “suck it up” mentality. The impact of such a culture shift is substantial.

On a very practical level, management can be trained to identify the signs of a struggling employee and approach them from a place of care and support. Management should also be trained to identify the signs of workplace substance misuse and overdose. Ensuring Narcan is available on work sites to reverse the effects of an opioid overdose is essential. Employees should be trained on administering this lifesaving drug in the same way they are trained on CPR/first aid.

Providing Resources for Employees and their Families

In addition, employers should offer a variety of resources for employees and their families. These resources should range from prevention and early intervention services to treatment/recovery support. Modalities of care should range from “self-guided” content driven to more traditional clinical supports. Talk about these resources frequently to make it commonplace.

Mental health awareness should transcend “Mental Health Awareness Month.” Make it easy for employees to find information.

Make access to resources for mental health and substance use a frictionless, “low barrier” experience. Meet your employers “where they are” in their journey. There is no one-size-fits- all solution for behavioral health issues. Youturn Health’s construction pathway is a perfect example of an individualized, flexible, and convenient avenue of support for your people. **BG**

This article is reprinted with the author’s permission from the May/June 2024 edition of California Constructor. Richard Jones is chief clinical officer and founder of Youturn Health. He can be reached at rjones@youturnhealth.com. Bridget Kelly is vice president of growth and strategic partnerships at Youturn Health.

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INDUSTRY & COMMUNITY NEWS



The MBA Young Constructors (YC) Committee spent a June afternoon volunteering at the Greater Pittsburgh Community Food Bank working as checkout personnel, shopping assistants, and shelf stockers. Pictured are (back row from left) volunteer Carol Karabinos, Seubert's Josh Restauri, Mary Chuderewicz from the MBA, Jendoco's Dominic Ammon, the MBA's Elli Frye, Zane McShane from Nicholson Construction, and PJ Dick intern Kendall McAlister. In front (from left) are John A. Mascaro, Turner's Laura Traczynski, Audrey Szalkuski, Sydney Zalewski, and Alex Nine from Mosites Construction.



(From left) Mike Clista from Clista Electric, MBA President Ray Volpatt, and Ken Tibbens from PJ Dick at the ASA Golf Outing at Chartiers Country Club on August 19.



(From left) Ray Gajski from Ruthrauff Sauer, Tom Turner, and Matt Jameson from Burns White.

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(From left) Brian Pagnotta from Pagnotta Estrada Architects, with Mosites Construction's Mike Lackey, Brandon Hamay, Ken Phillips, Alex Mosites, and Sam Reihls at the July 19 MBA Young Constructors Clays Shoot.



(From left) Joe Gizoni from Manheim Dellovade, Ryan Dietz and Mike Gille from Repts of Ohio, and Aaron Cooper from Cooper Trading.



The Eastern Atlantic States Regional Council of Carpenters hosted the Master Builders' Association's intern luncheon at the Carpenters Joint Apprentice Training Center. Among the 35 interns from MBA members who attended were (from left) Landau's Luke Vittone and C.J. Saylor, and Caden Smith from Atlantic Engineering.



Lance Harrell from the MBA (left) with PJ Dick's Malia Hayes and Josh Matthews.



Mascaro's UPMC Mercy Pavilion Team was celebrated in the Team Category at the Engaging Pittsburgh: Innovative Practices Awards Ceremony. This award recognizes teams that demonstrate integrity, ingenuity, and creativity. The Pittsburgh Human Resources Association hosts this event to recognize the advances and accomplishments of Pittsburgh-based businesses in the areas of diversity, learning and development, talent recruitment and retention, leadership, and teamwork. Pictured from left are: Ed Hasis, Jon Machen, Joe Manganello, John A. Mascaro, and Paul Peterson.



Mascaro interns celebrated National Intern Day on July 25. They started their day with breakfast with Michael Blackwell, Owner of Cafe on the Corner. They visited ALCOSAN, University of Pittsburgh Recreation and Wellness Center, and University of Pittsburgh Sports Arena and Sports Performance Center. Pictured from left are: Alex Doe, Alby Breisinger, Nate Schachner, Jake Krawczyk, Kameryn Snead, Abby Schenk, Dave Lukac, Mitch Cook, and PJ Somers.



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(From left) McCaffery's Makaila Moulden and Courtney List, TEDCO's Kyra Sarver, and Jan Receski from OnPar Now at the NAIOP Pittsburgh Developing Leaders Golf Outing on August 22.



(From left) Drew Paolicelli from Architectural Lighting Sales, Brandon Mendoza from the MBA, NAIOP's Tom Frank, and Joe Sheerer from NAI Burns Scalo.



(From left) LLI Engineering's Matt Werner, Chris White, Beka Bellhy, and Wake Wildman.



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AWARDS & CONTRACTS

DiMarco Construction was awarded a \$16 million contract for the general construction of the PA Cyber Charter School's new \$20.1 million Operations Center and Warehouse in Midland, PA. The architect for the 78,000 square foot facility is Core Architects.

#1 Cochran awarded a contract to **DiMarco Construction** for the \$2.4 million renovation of the Body by Cochran in Irwin. The architect is Nudell Architects.

St. Vincent College selected **Turner Construction Co.** as construction manager for its new \$20 million, 75,300 square foot Dunlap Family Athletic and Recreation Center in Latrobe, PA. The project consists of a large span pre-engineered metal building structure that includes an indoor turf field, multi-sport courts, and a walking/jogging track. The complex also includes two pre-engineered metal building lean-to-structures, which contain locker rooms, fitness rooms, and other miscellaneous spaces. The architect is MCF Architects.

Allegheny Health Network selected **Turner Construction Co.** as construction manager for its \$55 million AHN Forbes Hospital Emergency Department Expansion and Renovation in Monroeville, PA.

Turner Construction was selected as construction manager for the buildout of 30,000 square feet of office and laboratory space for a confidential tenant at The Assembly in Shadyside.

A. Martini & Co. was awarded the fit-out for the Nelson Mullins Pittsburgh office relocation to PPG Place. The offices will be located on the 32nd floor, covering 14,000 square feet. The renovation includes offices, break rooms, conference rooms, restrooms, and a common corridor. The project architect for the law firm is LS3P and Fishman Architecture is the architect for the landlord.

A. Martini & Co. was awarded a contract to provide preconstruction and construction services for a 4 story, 10-unit apartment complex for Catapult Greater Pittsburgh and Main & Elm Development. The 15,000 square foot complex includes a lounge, play area, learning center with kitchenette providing services for single mothers with infants and small children. The architect is Rothschild, Doyno Collaborative.

Rycon Building Group was the successful low bidder for the general trades portion of the new \$42.6 million, 150,000 square foot, two-story Steel Valley Elementary School to consolidate the district's elementary students on the same campus as the middle and high school in Munhall, PA.

Elizabeth Forward Township School District awarded **Rycon Construction** a \$38.7 million contract for the general construction portion of its \$52.9 million emergency fire rebuild of the Elizabeth Forward High School in Elizabeth

Township. The architect for the 217,000 square foot addition and renovation is McLean Architects.

Starbucks chose **Rycon** Special Projects Group to oversee interior renovations totaling \$1.5 million at three locations in Pittsburgh, Erie, and Warren, PA.

Rycon Special Projects Group is the general contractor for First National Bank's new 2,100 square foot branch within Pittsburgh's Strip District.

Chick-fil-A selected **Rycon** Special Projects Group as the general contractor for their new location in Uniontown, PA.

Rycon Special Projects Group is handling a \$12 million renovation of a financial office.

Fine Wine & Good Spirits at River Town Shopping Center in Verona, PA is undergoing a 4,900 square foot renovation by **Rycon** Special Projects Group.

Allegheny Health Network selected the **Gilbane/Massaro/MBM** team as construction managers for the 290,000 square foot, \$450 million Cardiovascular Institute tower to be built at Allegheny General Hospital. The architects are NBBJ/RM Creative.

Massaro Corporation was the successful contractor on the renovations of the retail space and commercial kitchens for the Edinboro Market in Edinboro, PA. The architect is Michael Grab Architect.

Caliber Contracting Services was awarded the general construction contract for the City of Pittsburgh's \$5 million East Liberty Fire Station 8. The architect for the 30,000 square foot renovation is AE7 Architects.

AIMS Construction was selected as construction manager for the \$4 million UPMC St. Margaret Hospital – Main Hospital, Air Handler 2 and 3 Replacement. The engineer is Allen & Shariff Engineers.

University of Pittsburgh selected **AIMS Construction** as construction manager for its \$3.12 million Eberly Hall Labs 119, 143 and 146 Lab Renovations. The project was designed by Jacobs Consulting, Inc.

AIMS Construction was the successful general contractor for University of Pittsburgh Chevron Science Center 6th Floor Lab Renovation and Environmental Room Installation. The architect is R3A Architecture.

Mascaro was awarded the \$16 million Mt. Washington Tunnel SYS-24-003 contract by Pittsburgh Regional Transit. The project includes concrete installation, embedded rail trackwork, and OCS replacement. It also includes the demolition and construction of the concrete busway terminus.

Mascaro will also be doing investigative work for façade remediation as part of the UPMC Hoechstetter Building Facade Remediation project.

PJ Dick continues work within PPG Paints Arena on the main team store. The 5,100 square foot interior renovation includes complete renovation of this area including electrical and HVAC upgrades.

The **PJ Dick**-Granger Joint Venture is providing construction

management-at risk services for a Sheetz distribution facility in Findlay, Ohio. The project includes construction of a new 500,000 square foot distribution facility that includes three buildings, a 500-space employee parking lot, and 13 acres of truck yard on a 75-acre parcel.

PJ Dick is the construction manager-at risk for the renovation of an existing seven-story, 59,000 square foot medical office building, formerly the UPMC South Side Roesch Taylor Building, into 58 market-rate apartments, including studio and one-bedroom units.



WVU Medicine selected **Landau Building Company** as the general contractor for the Center for Reproductive Medicine renovation project in Morgantown, WV. This 4,000 square foot renovation will primarily focus on the second floor, with some minor work on the first floor of the existing suite. Hobbs+Black Associates will serve as the design architect, and H.F. Lenz is the mechanical and electrical consulting engineer.

Landau Building Company will oversee the 12,000 square foot multi-phase renovation of the 10th Floor West Wing at WVU Medicine Ruby Memorial Hospital. Hafer is the project architect.

Massaro Corporation was awarded a \$2.2 million contract for the renovations to Penn State Academic Activities Lab 201 to house a new semiconductor laboratory at the University Park campus. The project was designed by Gannett Fleming, Inc.

Massaro Corporation was the low bidder on the \$3 million general construction contract for the \$5.5 million Terminal Modernization Package 9A, Core Redesign at Pittsburgh International Airport. The architect for the project is Michael Baker International.

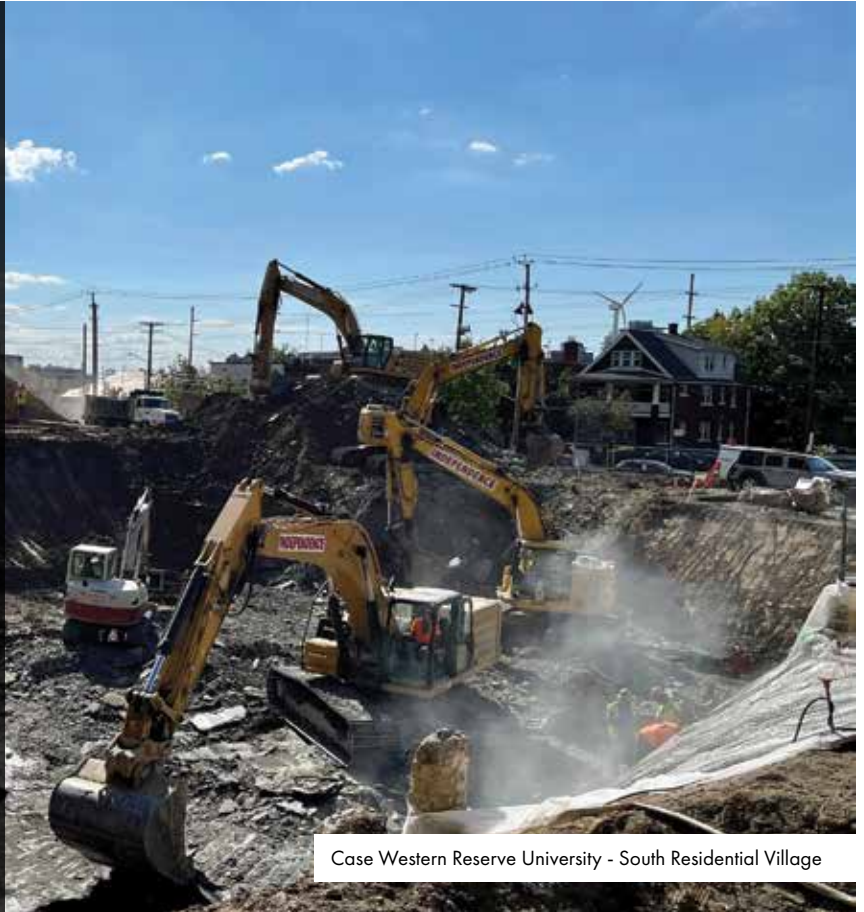




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FACES & NEW PLACES

The Board of Directors of the **Master Builders' Association of Western PA** announced that **Jennifer P. Landau** was appointed director, replacing **Jeffrey Landau**, who has retired. Jennifer is president of **Landau Building Company**.

Abby Krehl joined **Gilbane Building Co.** as preconstruction manager. Krehl has 10 years' experience in project management and procurement. She is a 2014 graduate of Penn State University, with a bachelor's degree in architectural engineering and construction management.

AIMS Construction announced that **Chris Wessel** as project manager. Wessel is a 2017 graduate of Kent State University with a degree in construction management.

Zak Hutchinson joined **AIMS Construction** as superintendent.

Zach Devenney joined **Mascaro** as an assistant project manager in the Client Services Group. He graduated from Penn State with a degree in Civil Engineering.

Former accounting intern, **Kaylee Madey**, joined **Mascaro** full-time as a project accountant on July 29. She is a recent graduate from Westminster College and earned her bachelor's degree in accounting.

Tyler Alexander recently graduated from Kent State University with a degree in construction management. A former intern, Alexander joined **Mascaro** on July 29.

Kevin Finn joined **Mascaro** on July 29 as a project engineer. He recently graduated from Clemson University with a bachelor's degree in construction management. He previously completed two internships with Mascaro.

Roman Murgi graduated earlier this year from West Virginia University with a bachelor's degree in civil engineering. He completed one internship rotation last summer with Mascaro. He joined **Mascaro** full-time as a project engineer on July 29.

Joe Hancovsky joined **Shannon Construction** as project engineer. Hancovsky is a graduate of the University of Pittsburgh with a degree in mechanical engineering.

Jonathan Gottschall joins **PJ Dick** as an assistant superintendent. He has six years of industry experience and is a construction management graduate from Philadelphia University.

PJ Dick's West Chester office welcomes **Katelyn Bernotas** as its new administrative assistant. Katelyn has a BS in criminal justice from Eastern University and an MBA from Widener University.

Rachel King was hired as a project engineer in **PJ Dick's** estimating department. She is a 2021 graduate of Kent State

University with a BS in construction management and served as a project manager at United Mechanical contractors in Cleveland, Ohio, before joining PJ Dick.

Turner Construction welcomed **Hunter Shultz** as superintendent in the Pittsburgh office. He has three years of experience at Turner in its Mid-Atlantic region.

Turner welcomed **Mike Leo** to its Pittsburgh office. He is a recent graduate of Penn State University and will be working as an engineering assistant.

Rycon Pittsburgh (PGH) is excited to welcome **Justin Altmeyer** as a business development representative, who recently graduated from the University of Dayton.

Indiana University of Pennsylvania alumnus, **Jeremy Jackson**, joined **Rycon** PGH Building Group as a project engineering assistant.

Gabe Marchant, a Carnegie Mellon University alumnus, has joined **Rycon** PGH Special Projects Group as an assistant project manager.

Rycon PGH Special Projects Group is pleased to welcome **Alex Metzler** as a senior project manager, with over 20 years' construction experience.

Penn State University alumnus, **Ryan Rhodes**, has joined **Rycon** PGH Building Group as a project manager.

With over 11 years' experience, **Brandon Rupert** joined **Rycon** PGH Special Projects Group as a senior estimator.

Ryan Zimmerman, a Penn State University alumnus, joined **Rycon** PGH Special Projects Group as a project engineer.

Craftworks USA welcomes Allegheny College alumnus **Peter Slovonik** as a project manager, with over 18 years' experience.

Landau Building Company is pleased to welcome **Margie Cattley**, who was recently hired as a receptionist.



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LGA Partners is an award-winning, full-service architectural design and planning firm headquartered in Pittsburgh, PA. For over 30 years, we have formed meaningful partnerships with clients, consultants, and stakeholders, producing inspiring and enduring architecture. Specializing in Aviation, Education, Healthcare, Housing, Retail, and Workplace design, our team of 85 talented and diverse professionals creates exceptional solutions for outstanding project solutions. Renowned both locally and globally for our commitment to Design that Works, we are consistently ranked as one of Pittsburgh's largest and fastest-growing firms and have been voted a "Best Place to Work" five years running. Our collaborative culture fosters innovation across specialized studios, ensuring each project not only meets but exceeds client expectations.



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Perkins Eastman is a global design firm founded on the belief that design can have a direct and positive impact on people's lives. Striving for a sustainable and resilient future, and to enhance the human experience through the built environment, our award-winning practice draws on its nearly 1,000 professionals networked across 23 studios worldwide, comprising of work in a wide range of specialized project types. From education, workplace, senior living, and healthcare to mixed-use, residential, civic/cultural and transit-oriented developments, we are uniquely equipped to tackle the most complex of design challenges. For more information, visit www.perkinseastman.com.

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T: 412.391.2884 | F: 412.391.1657
www.pwwgarch.com
Lisa Carver, AIA, LEED AP, Principal
lcarver@pwwgarch.com

Forward-looking clients partner with PWWG for exceptional design and detailing; cost-effective, buildable designs using sustainable principles; our meticulous, ethical approach to professional responsibilities; and the partnerships we nurture. PWWG works throughout the tri-state area from offices in Pittsburgh and Cincinnati. Projects for developers and private clients include multi-family housing, cultural buildings, mixed-use commercial, and adaptive re-use of existing structures. PWWG's portfolio is 50% new construction and 50% renewal and re-use, creating new value for original buildings. Our turnkey services include: feasibility and space programming, concept studies, forensic assessment, support for funding applications, architectural & interior design, 3D visualizations, and project management.



R3A Architecture

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www.r3a.com
James Sheehan – jas@r3a.com
Deepak Wadhvani – dw@r3a.com

R3A believes that empathy-driven architecture shapes meaningful human experiences. R3A's team of architects and interior designers collaborates closely with our project partners to create built environments that support and enrich our communities – educational, scientific, workplace, residential, civic, non-profit, and others. Our approach leverages design thinking to reframe the dialogue around our clients' needs beyond effective planning and cost-responsive construction, using a research-driven and iterative process of analytical rigor, to reimagine solutions that not only respond to our clients' needs and challenges, but harmonize measurable performance goals with strategic aspirations.



Wildman Chalmers Design

1622 Lowrie St, Pittsburgh, PA 15212
412.436.9303
wildmanchalmers.com
Chad Chalmers, RA, AIA, NCARB, LEED AP, Partner
chad@wildmanchalmers.com

Wildman Chalmers Design is an award-winning mid-size architectural and interior design firm based in Pittsburgh, PA that works collaboratively with clients, regionally and nationally, to transform their goals and visions into creative design solutions. The firm comprises a diverse group of professionals dedicated to delivering high quality design, documentation and execution, and client service. Our experience covers a wide range of new construction and adaptive reuse projects including commercial, institutional, education, hospitality, retail, residential, and workplace.



WTW Architects, an AE Works company

800 Waterfront Drive, Suite A, Pittsburgh, PA 15222
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Rachel Sweetland, Business Development Associate
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WTW Architects, an AE Works company, brings 65 years of award-winning design across education, commercial, and healthcare markets. Known for leadership in higher education facility design, WTW has impacted over 140 campuses, including Pittsburgh landmarks like Acrisure Stadium. Recently, we joined AE Works, a top-ranked firm, to form one of Pittsburgh's largest architecture firms. This strategic move expands our national reach, market expertise, and new capabilities in engineering and planning + project services promising enhanced client service and innovative design solutions. Our AE Works team brings over 100 professionals with increased expertise and flexibility, focused on making building projects a better value.

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Overhead Door Company of Greater Pittsburgh is a Veteran-owned business specializing in commercial, industrial, and residential door systems, loading dock equipment and operable partitions. Overhead Door has always produced and installed the highest quality products. Our superior craftsmanship and dedication to excellence has made us the leader in door systems for Western PA and the Tri-State Region. Our Red Ribbon trademark is your guarantee for receiving unequalled personalized service and expertise – from assistance with product selection through the timely completion of product installation. We also offer our customers preventative maintenance plans as well 24/7 emergency repair service 365 days a year.

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Since 1954, Gateway Engineers and its predecessors have played an active role in the development of this region. The tradition of providing value-added engineering solutions carries on as the company continues to grow and expand its reach into other parts of the United States. Our team of professional engineers, surveyors, construction inspectors, and landscape architects, along with qualified technicians, is ready to provide the expertise and personalized service which every project deserves. Our mission has always been to help our clients reach a higher level of success through knowledge, experience, and responsiveness. This year marks our 70th anniversary, but our brightest days lie ahead. For more information, visit www.gatewayengineers.com.



Mackin Engineers & Consultants

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www.mackinengineering.com
Steve Janosko, PE – President

Serving our clients since 1960, Mackin Engineers & Consultants continues to be a leader in the civil engineering field. We offer a wide range of professional consulting services for both public and private sector clients throughout the Commonwealth. Mackin places an emphasis on our staffs' ongoing professional development to best serve our clients. Our multi-disciplinary staff includes dedicated professionals in the fields of civil, traffic, transportation and structural engineering, landscape architecture, community planning, GIS mapping, and construction inspection/management.



Red Swing Group Engineers and Surveyors

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Red Swing Consulting Services, a Veteran-Owned Business, views its Client as Partners; focusing first and foremost on building and maintaining strong relationships and trust. This mutual trust is the foundation of a solid business partnership. Red Swing offers Land Development Consulting Services to take a project from concept through construction. Red Swing has experience in Surveying, Civil Engineering, Utility, and Water Resource Projects. Red Swing effectively maximizes the return on investment through a collaborative design approach, utilizing a low impact design philosophy that reduces project capital costs and produces the competitive edge that we and our partners demand.

CONTRACTORS



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320 Grant Street, Verona, PA 15137

T: 412-828-5500

www.amartinigc.com

Emily Landerman – Emily.Landerman@amartinigc.com

As a fourth generation, family owned and operated General Contracting and Construction Management firm, we are celebrating our 73 years of operation. The principals of A. Martini & Co. continue to provide hands on participation as a commitment to our clients and each of their projects. We believe that building projects as a true partner to the owner, utilizing sustainable building practices, and promoting true diversity in our subcontractor selection are the best practices for our region. As a mid-sized CM/GC, we utilize current technology for project tracking and scheduling coupled with personal attention to details, and our client's needs. A. Martini & Co. provides construction management, general contracting and design build services for corporate, healthcare, senior living, restaurant, religious, retail, non-profit, residential, industrial, historic, and education clients.



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www.burchick.com
Dave Meuschke – meuschke@burchick.com

Burchick Construction is a full-service general contractor founded on the commitment to excellence that Joe Burchick brings to each project. Burchick's management approach is designed to ensure optimum results for our clients while setting the performance standard for construction services. Our executives and managers have broad-based experience delivering construction to the highest of standards with every delivery method preference. Burchick's project team and professional engineers on staff are equally comfortable with a completed design or with providing pre-construction assistance at the earliest stages of design. Burchick has managed commercial, institutional, and industrial projects from \$1 million to \$73 million with equal attention. Burchick Construction – Setting the Performance Standard.



Carl Walker Construction

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Greg Heddaeus, Partner
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Carl Walker Construction (CWC) has remained the industry leader for parking garage design, construction, restoration, and specialty concrete projects since its inception in 1996. We are a single-source solution for owners seeking accurate scheduling and cost prediction, turn-key design, streamlined and transparent contact, and thorough certification and training by a self-performing garage expert. Our experience is our advantage: we do not compromise on workmanship, product quality, design detail, or safety.

CWC focuses on the prolonged integrity and sustainability of the structures we restore and build, and take a proactive approach in applying improvements and beneficial modifications when applicable and cost effective.

We are proud members of the International Concrete Repair Institute and American Concrete Institute, and have earned multiple safety awards and acknowledgements for our dedication to industry best practices.



Cuddy Roofing

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John Leuch – Vice President, General Manager
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www.cuddyroofing.com

Established in 1991, Cuddy Roofing is one of the largest, premiere union roofing companies in the area. We specialize in difficult, high-end, and sheet metal sustainable applications as well as full-service repair and maintenance. Using state-of-the-art technology, Cuddy Roofing has topped some of the largest and most prestigious buildings in downtown Pittsburgh. We offer our customers superior roofing products that are backed by the best warranties in the industry.



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Dick Building Company

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http://www.dickbuilds.com/
T: 412.567.8200
Alexander Dick, Chief Operating Officer
agdick@dickbuilds.com

Dick Building Company combines the knowledge acquired from four generations of industry leadership with the latest in construction technology to maximize value for our clients. We maintain integrity and an unwavering work ethic at all levels of the company and promote open communication in our relationships with clients, design professionals, subcontractors and vendors. Dick Building Company carries these values across our spectrum of services, which include: pre-construction consulting, construction management, general contracting, design-build, project management, program management, green building, and construction inspection.



Gilbane Building Company

11 Stanwix St Suite 701, Pittsburgh, PA 15222
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Chris Perez, Business Development Manager
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Gilbane Building Company provides a full slate of construction and facilities-related services – from preconstruction planning and integrated consulting capabilities to comprehensive construction management, general contracting, design-build, and facility management services – for clients across various markets. Founded in 1870 and still a privately held, family-owned company, Gilbane has more than 45 office locations worldwide. Gilbane first established a presence in the Pittsburgh market in 1987 and has built a wide range of projects in markets such as healthcare, higher education, and commercial in the area.



Jendoco Construction Corporation

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www.jendoco.com
Michael Kuhn – mkuhn@jendoco.com

JENDOCO Construction, founded in 1957, is located in Pittsburgh's East End and provides building construction services to the Western Pennsylvania region. Jendoco believes that the built environment should have a Net-Positive impact on people, nature, and communities and that designing and constructing the places in which we live, work, worship, learn, heal and play should be collaborative, creative, and fun. Through proactive solution development, sustainable building practices, community engagement, and charitable support, Jendoco continues to demonstrate our commitment to the Greater Pittsburgh Region.



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Mascaro Construction

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www.mascaroconstruction.com
Michael R. Mascaro - mcclp@mascaroconstruction.com

Mascaro is one of the region's largest construction firms specializing in design-build, construction management, and general contracting. Founded in 1988 on the simple premise to deliver excellence in construction services, we bring to your project the 'Mascaro Advantage.' We are humble, hungry, and smart – not shying away from hard work and complex projects, but tackling each one proactively. We do what we say we are going to do, right, the first time. We will provide a family atmosphere, concentrating on the health and welfare of not only our employees, but also that of our clients and community. Our success is based on our market diversity, superior planning, building relationships, and, most importantly, delivering great experiences.



McKamish, Inc.

50 55th Street, Pittsburgh, PA 15201
T: 412-781-6262 | F: 412-781-2007
www.mckamish.com
John Jordan – jjj@mckamish.com

Serving the mid-Atlantic region with almost fifty years of experience, McKamish is a full-service mechanical contractor specializing in commercial HVAC, plumbing, piping, industrial piping, custom metal fabrication, and 24/7 service and maintenance. McKamish is dedicated to "Building Excellence" on every project that we build. With a dedicated team of employees who are committed to our customers, you can feel confident that your project will be handled with integrity. A family-owned company with deep roots in the Pittsburgh community, our goal is to surpass customers' expectations and provide top quality service in everything we do.



PJ Dick Inc.

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PJ Dick is a part of a Pittsburgh, PA based family of companies that provides best-in-class construction management staff to estimate, plan, and build the Mid-Atlantic region's most prominent projects. Since 1979, PJ Dick has served markets including commercial, government, hospitality, healthcare, higher education, industrial, K-12 education, multi-family and senior living, and sports and entertainment. Consistently ranked among the nation's top firms, PJ Dick offers unsurpassed general contracting, design/build, construction management, and consulting services while maintaining its values of safety, sustainable building, quality construction and innovative technology.



Rycon Construction Inc.

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T: 412-392-2525
www.ryconinc.com
Lou Ferraro, Co-President - Pittsburgh
Stephen Kosmer, Co-President - Pittsburgh

Founded in Pittsburgh, Rycon Construction is an employee-owned company (ESOP) that provides construction management, general contracting, and design-build services nationwide. We have an in-house Architectural Woodwork & Specialty Fabrication Division, Craftworks USA, that ships/installs nationally as well as a Service Division offering 24/7 emergency service/restoration and term service work in Western PA. Rycon is an ENR Top 400 Contractor, ENR Top 100 Green Contractor, and celebrated our 35th anniversary in 2024. We have nine offices in Pittsburgh, Atlanta, Charlotte, Cleveland, Fort Lauderdale, Fort Myers, Houston, Philadelphia, and Washington, DC, and specialize in new construction, renovations, and adaptive reuse projects. Rycon's portfolio consists of projects and developments in health care, education (K-12 & higher ed), industrial/warehouse, commercial, multi-unit residential, retail, financial, food service, governmental, hospitality, cannabis, self-storage, and LEED facilities.



Shannon Construction Company

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www.shannon1.com
Ken Schultz, President
ken@shannon1.com

Shannon Construction is a commercial builder with a rich legacy handed down from generations of family. Our objective is to develop and deliver customized building programs that meet our client's goals. Shannon utilizes a creative, collaborative project approach to ensure client satisfaction and successful outcomes on every project. Clients benefit from our service philosophy rooted in personalized attention to every detail. We believe the best way to do business is to treat people fairly and do the right thing. Our services include General Contractor, Construction Management, Design & Build, Self-perform Construction, Building Construction Maintenance, and Green Building techniques.



TRE Construction & Real Estate A Commercial Construction Company

1800 Pine Hollow Road, McKees Rocks, PA 15136
T: 724-650-5544
www.treconstruction.net
Angie Eger, Owner/Managing Member
angie.eger@treconstruction.net

Formed in 2022, TRE Construction focuses on being a high-quality and trusted subcontractor/general contractor specializing in interior/exterior building systems, construction specialties, and casework/millwork – including slab/flatwork concrete, disaster restoration, new construction and remodeling - in Greater Western PA, OH, WV, DC, MD, VA and national locations.

Family-owned and operated, we provide the highest quality of work and deliver cost-effective projects on schedule by employing and supporting motivated, flexible, and focused teams. Our clients count on our dependability, drive, and integrity. People and Safety are the most important assets to build better with TRE. We are a member of the Master Builders' Association, Master Interior Contractors Association and NAIOP Pittsburgh.

Turner

Turner Construction Company

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T: 412-255-5400
Chris DiLorenzo
cdilorenzo@tcco.com

Founded in 1902, Turner Construction Company is the largest general builder in the United States. Our continued success is built upon an unwavering dedication to our core values of teamwork, integrity, and commitment. Turner's roots in Western Pennsylvania date back to 1908, with a contract for work on Forbes Field. In the intervening years, we built or managed the construction of many of the city's signature buildings. We opened a full-time Pittsburgh office in 1976 and have since built or managed the construction of many leading commercial, residential, institutional, industrial, and healthcare facilities in the region. Turner's Pittsburgh office continues to provide our clients with industry-leading resources with a local, dedicated staff.



Volpatt Construction Corporation

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www.volpatt.com
Ray Volpatt, Jr. President – rayjr@volpatt.com

From our first renovation in 1991, to over 900 industrial, commercial, and institutional projects, Volpatt Construction has successfully positioned itself as one of the most respected building contractors in the Tri-State area. With a focus on high quality, hands-on service, competitive pricing, and timely project completion, Volpatt Construction has built and maintained a long list of repeat clients, partnering with the finest businesses and institutions in the area. Today, the family-operated company continues to play an integral role in building the region into a top global destination for healthcare, education, and research.

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Ric Ford
rford@ambridgeregional.com

The Ambridge Regional Center offers over 1 million square feet of warehouse, distribution, manufacturing, lab and yard space for lease. Our tenants include Fortune 100 firms as well as small private companies.

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The Buncher Company

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412-422-9900
www.buncher.com

The Buncher Company, headquartered in Pittsburgh, Pennsylvania, is a recognized leader in all phases of real estate development, including site acquisition, construction, brokerage and leasing, and property management.

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Elmhurst Group

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Eric R. Schindler, Director of Leasing
eschindler@elmhurstgroup.com

The Elmhurst Group of companies is a 46-year-old Pittsburgh-based organization that invests in commercial real estate and the hospitality industry. Elmhurst's real estate holdings include 46 buildings on 23 sites totaling more than 3.6 million square feet of office, flex, distribution, student housing, and hospitality space.

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OXFORD

Oxford Development Company

2545 Railroad Street, Pittsburgh, PA 15222
412.261.1500
www.oxforddevelopment.com

For over 60 years, Oxford has stood at the forefront of the marketplace as a developer and full service commercial real estate services provider with experience in the local, regional, and national marketplace. Oxford's mission is to forge dynamic centers where community thrives alongside commerce, through real estate solutions that uplift and ignite inspiration for our people, partners, and communities alike. We deliver real estate solutions to our clients that are innovative, cost-effective, and sustainable. Our team has the depth of experience to manage, lease and develop all types of facilities. Oxford's ability to create unique partnerships and complete complex transactions makes us a preferred real estate partner.

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ECONOMIC DEVELOPMENT



Community Development Corporation of Butler County

110 East Diamond St., #201/202 Butler, PA 16001
T: 800-283-0021 | F: 724-283-3599
www.butlercountycdc.com
Joe Saeler, Executive Director
jsaeler@butlercountycdc.com

The Community Development Corporation of Butler County (CDC) is the lead economic development organization in Butler County. The CDC is your first contact for economic development in Butler County. The CDC works closely with you to identify the right location for your business. The CDC also has financing available for real estate, equipment, working capital and lines of credit.



Indiana County Center for Economic Operations

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www.indianacountyceo.com
Byron G. Stauffer, Jr., Executive Director
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The Indiana County Center for Economic Operations (CEO) serves as a public-private partnership promoting economic growth, development, and prosperity in Indiana County, PA. The CEO serves as a hub for businesses, government agencies, and community organizations. The CEO provides services and resources for businesses throughout their life cycle. The CEO offers site selection assistance, an array of pad-ready sites and buildings and coordinates financial incentives. The CEO seeks to support the continuous improvement of Indiana County through increased business activity, economic growth, education, tourism and quality of life.



Washington County Chamber of Commerce

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T: 724-225-3010 | F: 724-228-7337
www.washcochamber.com
Will Thomeier, Director Economic & Tourism Development – will@washcochamber.com

The Washington County Chamber of Commerce is the largest chamber of commerce Southwestern Pennsylvania and leading economic development agency in Washington County. The Chamber focuses on marketing and business development initiatives to expand the economy of Washington County and was one of the first organizations to publicly support the economic benefits and job creation potential of the natural gas industry. Learn more at www.washcochamber.com.



Westmoreland County Industrial Development Corporation

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T: 724-830-3061 | F: 724-830-3611
www.westmorelandcountyidc.org
Jason W. Rigone, Executive Director
wcidc@wpa.net

Founded in 1983 by the Westmoreland County Board of Commissioners, Westmoreland County Industrial Development Corporation promotes growth in terms of job creation, economic output and a stable tax base for Westmoreland County. By developing a robust industrial park system, deploying a comprehensive marketing strategy, administering a proactive Business Outreach Program and collaborating in public/private partnerships, WCIDC supports business growth that results in job opportunities for the citizens of Westmoreland County.



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KU Resources, Inc. provides a full range of environmental management and site development engineering services to industrial, commercial, and community based clients. The firm specializes in brownfield redevelopment, environmental site assessment, economic revitalization assistance, regulatory permitting and compliance, remediation design and implementation, and environmental risk management strategies. The firm's engineering and environmental consulting capabilities also include the areas of civil and geotechnical engineering, site development engineering, water resources engineering, mining and quarry services, water quality monitoring, and air quality compliance and permitting.

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 Kevin A. Brett, P.E. – kbrett@lsse.com

A leading provider of civil engineering and surveying services for nearly 40 years. Serves public and private clients in the municipal, commercial, industrial, institutional, residential, and utilities markets. Specializes in wastewater facilities, water facilities, and stormwater/green infrastructure planning, design, and construction phase services. LSSE's operating plan turns on client satisfaction and corporate and individual career development.



Triumph Services

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 Patrick Thornton, AIA | Partner: Head of Relationships
 patrick@sixmocompanies.com
 Aaron Mitchell, P.E. | Principal-in-charge
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Triumph Services, founded in 2023 as a part of the Sixmo Companies, is a multidiscipline engineering and professional services firm offering comprehensive design solutions throughout the Midwest. We operate on the principle that collaboration produces the best outcomes, efficiently managing projects of all sizes. Our team of professional engineers and surveyors apply technical expertise across diverse markets and clients, including fellow design firms. Committed to enhancing service delivery for existing clients while cultivating new relationships, we ensure reliable solutions and exceptional service. In addition to our full suite of engineering and professional surveying services, we also provide materials testing.



KU Resources, Inc.

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KU Resources, Inc. provides a full range of environmental management and site development engineering services to industrial, commercial, and community based clients. The firm specializes in brownfield redevelopment, environmental site assessment, economic revitalization assistance, regulatory permitting and compliance, remediation design and implementation, and environmental risk management strategies. The firm's engineering and environmental consulting capabilities also include the areas of civil and geotechnical engineering, site development engineering, water resources engineering, mining and quarry services, water quality monitoring, and air quality compliance and permitting.

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FINANCE



Dollar Bank

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www.asawpa.org
Angie Wentz, Executive Director
angie@asawpa.org

ASA Western PA is the united voice dedicated to improving the business environment and representing subcontractors before all branches of government, other construction industry groups, and the media. We strive to promote quality construction, ethical and equitable business practices, safety in the work environment, and best industry practices. Our scholarship program reaches students interested in the trades through partnerships and school visits.

A Mentorship Program is available for all scholarship recipients. ASA's Emerging Leaders create an environment of young professionals who have the potential to serve in leadership roles and provide networking opportunities that help to expand their careers.



Labor & Management • Building Our Region's Success

Builders Guild of Western PA, Inc.

631 Iron City Drive, Pittsburgh, PA 15205
T: 412-921-9000
Jeff Nobers, Executive Director
jnobers@buildersguild.org

A unique, non-profit labor/management initiative, representing 16 building trade unions and nine affiliated contractor associations. The Builders Guild is a positive forum for labor, management, and community relationships, and fosters a cooperative and productive climate for regional commercial construction development. Through the Builders Guild, unions and management have forged fair and equitable working partnerships which promote economic and professional growth.

Guild initiatives include:

- Promoting the professionalism, skill, and pride inherent with union construction;
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Ironworker Employers Association of Western Pennsylvania

Bailey Center II
135 Technology Drive #311, Canonsburg, PA 15317
T: 412-922-6855
www.iwea.org
Danielle Harshman, Executive Director
dharshman@iwea.org

The IWEA is a Trade Association of Union Contractors who work in all aspects of the ironworking trade within the construction industry. We are a resource for all owners, developers and contractors who are looking for a qualified contractor with a well-trained workforce. Visit our website or call our office for additional information.



Master Builders' Association of Western PA, Inc.

631 Iron City Dr., Pittsburgh, PA 15205
T: 412-922-3912
www.mbwpa.org
David D. Daquelente, Executive Director
dave@mbawpa.org

Master Builders of Western Pennsylvania, Inc., is a trade association and influential voice in the construction industry, including 282 general contractors, construction managers, specialty contractors, service, and supplier companies. Members are responsible for more than 80 percent of the Pittsburgh area commercial construction. MBA awarded \$800,000 in scholarship support to students in industry-related categories, brought nearly 1500 representatives of our industry together to celebrate the MBA Building Excellence Awards, and supports mental health through its acclaimed Yinz Good? campaign. MBA's affiliation with Associated General Contractors of America affords members with broader access to national resources. For more information visit <http://www.mbwpa.org/>



NAIOP Pittsburgh

PO Box 100085, Pittsburgh, PA 15233
www.naioppittsburgh.org
Tom Frank, Executive Director
info@naioppittsburgh.org

NAIOP Pittsburgh is the regional association of developers, owners, investors, and professionals in commercial real estate. We are the leading industry resource to foster business relationships, promote responsible development and support growth of the region through education, leadership, and advocacy. Visit naioppittsburgh.org for additional information or contact info@naioppittsburgh.org.



Pittsburgh Works Together

631 Iron City Drive, Pittsburgh, PA 15205
Jeff Nobers, Executive Director
info@PghWorks.com | www.PghWorks.com

Pittsburgh Works is committed to creating an inclusive vision of economic progress that embraces and respects both traditional legacy industries and emerging ones, while honoring the diversity of cultures and traditions inherent to each, while ensuring a sustainable environment. We seek a Pittsburgh and a region in which the lines between "old" and "new" economy are erased and respect is shown for our work ethic and dedication to community, while building a future for all.

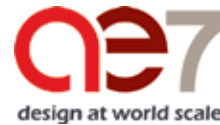
Pittsburgh Works Together knows that we need an economy that works for everybody. Created after meetings of union leaders and officials from the manufacturing, steel, and energy sectors, our organization is committed to working with leaders of tomorrow's industries by reminding them that without everybody, there is no New Pittsburgh.



Society for Marketing Professional Services

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The Society for Marketing Professional Services (SMPS) is a diverse community of marketing and business development professionals working together to move the Architecture/Engineering/Construction (A/E/C) industry forward. SMPS is the only organization dedicated to creating business opportunities in the A/E/C industry. Companies large and small are able to tap into our powerful national and regional network to form partnerships, secure business referrals, and benchmark performance. The Pittsburgh Chapter offers educational programs, professional development seminars, and networking opportunities to professionals from architectural, engineering, planning, interior design, construction, and consulting firms serving the Pittsburgh region. SMPS Pittsburgh has over 100 members representing more than 50 firms in the built industry.



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10**

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7**

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But this potential can only be fully realized if manufacturing is at the center of our story. Manufacturing is where the larger numbers of family-sustaining jobs are created and, so far, our region is missing out. Despite massive federal subsidy being poured into creation of new manufacturing facilities, particularly for clean energy companies and chip manufacturers, almost none have chosen to locate in Southwestern Pennsylvania.

The Pittsburgh region has a long and storied history as a center of manufacturing, dating back more than a century to the companies that led our country's industrial revolution. That legacy of combining manufacturing and innovation is alive today and can drive the future growth of jobs and our population.

Bright spots in our manufacturing eco-system include Eos Energy, now located at RIDC's Keystone Commons, the former Westinghouse campus in Turtle Creek. Eos has commitments for federal loan guarantees and additional new private capital and plans to grow to as many as 1,000 employees as they ramp up production in the Mon Valley.

Re:Build Manufacturing is another, as it begins operations in New Kensington Advanced Manufacturing Park, a partnership between RIDC and the Westmoreland County Industrial Development Corporation. An exciting company whose mission involves bringing manufacturing back to the United States, Re:Build is planning to create an initial 300 high-quality jobs at this site, a former Alcoa plant.

The re-shoring concept Re:Build is leading has gained steam across the U.S. post-Covid, as companies recognize the need to keep vital industries on our soil and supply chains closer to home.

At RIDC's Westmoreland Innovation Center, Intervala is a manufacturer of complex, high-performance printed circuit board assemblies, electromechanical systems, and cable and harness assemblies. Also at that park is Siemens, one of the world's largest producers of energy-efficient, resource-saving technologies and a leading supplier of systems for power generation and transmission.

Our great universities, including Carnegie Mellon University and the University of Pittsburgh, are continuing to drive growth in autonomous technology and life sciences – and as the new technologies they develop move toward commercialization, this region will need an inventory of sites suitable for manufacturing operations to capitalize on the growth these companies could potentially represent.

Governor Shapiro's plan to create a \$500 million fund to make sites ready for development – along with permitting reform and other inducements – is an important first step. In recent years, our lack of sites that could be made available quickly has deterred large manufacturing companies from considering the Pittsburgh region. We need to build on the tools we now have and capitalize on our roots as a region that knows how to build things.

We need a regional approach to identifying priority sites and to engaging in proactive, outbound business attraction efforts. We need economic development leaders from around the region to join forces with local and state government to market the region as a whole, both to businesses and to the workers those businesses will need.

Workforce is a crucial issue for every company, especially in regions like ours that have not seen population growth. Unlike R&D jobs that require advanced degrees, manufacturing provides high-quality, good paying jobs while turning that R&D into actual products for customers. Community colleges, including Westmoreland County Community College and Community College of Allegheny County, are already gearing up their workforce training programs.

And organizations like the Advanced Robotics for Manufacturing Institute and Catalyst Connection, are working to strengthen U.S. manufacturing through innovations in advanced manufacturing technology, particularly robotics and artificial intelligence, and preparing the workforce to work alongside these technologies.

Manufacturing creates jobs beyond those it employs directly. Large companies anchor supply chains, purchasing inputs from a variety of local companies and then selling their products around the world, bringing new revenue back to Southwestern Pennsylvania, thus multiplying the economic impact and producing revenue that improves communities and, in turn, attracts others. Pittsburgh's manufacturing power needn't be considered a relic of a bygone era. Its legacy can continue if we take the steps necessary to create an attractive environment for the manufacturing companies that are now defining and building our country's economic future, and then take the proactive steps necessary to sell that message directly to those manufacturers.

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