

# the Partnership Connection

SMACNA  
Columbia Chapter



SMWIA  
Local 16

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## Institutional/Commercial Real Estate Provides Diversification for Your Pension Plan

***Did you know that you are a part owner of office buildings and other commercial properties across the region?***

The Trustees of your Oregon Sheet Metal Workers Master Retirement Trust endeavor to provide for your future by creating and managing an asset mix that is widely diversified, to both mitigate risk and provide good returns. Many studies suggest that asset allocation is the primary driver of long term investment returns.

One asset class that plays a special role in diversifying your asset mix is real estate. Institutional real estate is usually grouped among several different property categories: industrial, apartments, office, and retail. Real estate is desirable for many reasons. For example, the Plan can benefit in two primary ways: properties can appreciate in value - and produce income. In addition, real estate is appealing because it is loosely correlated to traditional asset classes like stocks and bonds. By combining asset classes with little or no correlation, a plan can manage risk and increase returns.

Additionally, investing in real estate makes sense for our Plan because it offers collateral benefits to signatory contractors and union sheet metal workers.



*Our newest property - the Pacific Highway Center office building along Hwy 99 near King City - built with union labor by signatory contractors.*

Our local properties are new construction - and all of our real estate funds have mandatory union-only construction clauses. This requirement puts local people to work, improves our local economy, and puts even more retirement contributions back into your plans!

The trustees of your Plan realize that diversification via asset class is important - but so is having a variety of investment managers doing similar things. Your plan is currently invested in three funds, each managed by different firms, and will soon be investing in a fourth one. These funds include participation by other union construction trades. One fund specializes in properties in the greater Portland area, another concentrates on the Western United States and the third one is national in scope. The fourth fund will allow the Plan to have greater geographical diversification, and focuses on unique real estate investment strategies.

Our current investments in real estate account for approximately 13% of your Plan's total assets and are producing great income. And our local properties are new construction and debt free. Our managers note that the outlook for our properties is positive for 2008.

### In This Issue:

- Drug Testing Random Selection
- Training Center Update

## Partnering for Excellence



Len Phillips, Business Manager  
SMWIA Local #16

SMACNA  
COLUMBIA CHAPTER

Tom Goodhue, Executive Director  
SMACNA Columbia Chapter

The Sheet Metal Workers Trust Funds provide this quarterly newsletter as a resource for our participants, members, and contractors.

# HVAC & Metals Institute Update

by Dennis Boyd

## 2007 in Review

I've enjoyed learning and growing into my role as the new Training Director this past year. Much of this time was spent learning the ropes and trying to form a better connection with our members and contractors. I've been blessed to work with a staff that is both knowledgeable and passionate about what they do. Our folks are here because they enjoy what they do and they get a great sense of satisfaction seeing the impact they have on those who go through our programs.

Some of the key goals of our team are to make training more convenient for our members, to create more value for our contractors and to improve communication and stay better connected to the needs of our members and contractors.

*Here are some of the things we've done in the past year to accomplish those goals:*

◆ Last year 38 Apprentices graduated and we currently have 194 enrolled.

◆ Besides at our training facilities in Portland and Eugene, First Aid/CPR classes were also held at the following locations: Salem Hospital job-site for Temp Control employees, Robert Lloyd for their employees, FM Sheet Metal for their employees, Fitters hall in Salem for CJ Hansen employees.



◆ iTi calculator classes were held at Robert Lloyd and in Medford. Quarterly welder certifications have been implemented in Eugene. Weld certs and/or recerts were performed in the following shops; Hanset Stainless, R & J Metal Fab, Liberty Metal Fab.

◆ A safety summit was held to discuss the safety training we offer in our Apprenticeship. As a result we are currently working with the SMACNA Safety Committee on some new ideas on how to incorporate some OSHA 30 principles into our apprenticeship program.

◆ Brazing certifications were performed at Day Heating for their employees and employees of CJ Hansen. We qualified a welding procedure for a mild steel to stainless steel structural certification for Hanset Stainless. And a welding procedure was qualified for a bridge structural certification for Liberty Metal Fab.

◆ A session with interested Contractors concerning service training was held and resulted in modifications to the current curriculum to assist Service Apprentices gain their limited energy licenses.

◆ We asked for and received feedback on our new HVAC curriculum from key personnel with our contractors.

◆ In 2007 our continuing education focus was to increase First Aid/CPR numbers, and increase the number of welder certifications. Great strides were made in both of these areas. Our numbers are way up from previous years, and we plan to continue the growth in these areas.

◆ We held beginning and intermediate AutoCAD classes and held a fire damper inspection certification class, certifying over 50 members.

◆ At the training center the inside look and feel was changed a little to be more inviting and some of our technical and A/V equipment was updated. New materials for marketing the apprenticeship program were also created.

◆ And perhaps most importantly, we spent time touring shops and meeting with contractors and members during this last year!

## What's New for 2008?

Our industry and work continues to change every year. Keeping up with changes and learning new skills and techniques makes you marketable and keeps you, and our contractors, in demand. Your training centers are committed to increasing our continuing education offerings. Our focus will be to offer you convenient and relevant training.

We will be rolling out several new classes in 2008. **You can find an up-to-date list of classes we currently have scheduled on our website:** [www.sheetmetal-16.org](http://www.sheetmetal-16.org).

Besides the classes listed there, we are developing continuing education classes on the following areas: mentoring, codes, cost awareness, seismic, change orders, welder certification prep class, and detailing.

A fair amount of the future continuing education we will be offering will be leadership/supervisor training. The learning curve for supervisors can be steep and we are very

*(continued from page 2)*

passionate about helping new and current supervisors receive the types of training needed to be successful in the full scope of their jobs.

### Contact Us!

If you have ideas for additional or new classes please contact Dennis Boyd or Charlie Johnson. Interested in becoming a part time instructor? Contact Charlie Johnson for information. If you have questions about what we can do for you in the area of welding - whether it's qualifying procedures, certifications or training - contact Ric Olander. If you have any special needs or training requirements - please ask. We are here to serve and will do all that we can to make it happen!



**SUMMER  
BLAST**

**SAVE THE DATE**

**AUGUST 3RD**

**11:00 a.m. - 4:00 p.m.  
West Linn  
Willamette Park**

## Random Drug Testing - How Employees are Selected



The Sheet Metal Workers #16 Health Trust Drug-Free Workplace program began in January 2007 and is now fully underway. Computer-generated random testing is the deterrent component of the Program. The goal is to have each person covered by the program be subject to drug testing at all times. The following are answers to a few questions that have come up regarding how an individual is selected to take a random drug test.

### Who Makes the Selection of Those to be Tested?

The random selection process is conducted on a regular schedule by the Program Manager (Wolfgang Associates) from lists of active workers provided by the Health Trust. The random process does not involve input from our employers.

### How Does the Random Selection Process Work?

The process starts with an update to the random selection database from the Health Trust, so the Program Manager can select from people who are on record as being currently employed (and therefore available to test) at the time of selection. The Program Manager updates the files in a computer software program specifically designed for random selections.

The computer software is based on a "double blind" system, where the records are scrambled twice. First, all the records for that selection are put into one "pool" and assigned a randomly generated number. Second, records are selected from the random numbers, without regard to the names or ID numbers associated with the original records. Finally, the selected random numbers are re-attached to the names and ID numbers of the original records, allowing the Program Manager to print lists of selected employees. The names of the randomly selected employees are then confidentially communicated to the Designated Representative of their employer who then informs the selected employee.

### When Does the Random Test Occur?

Once notified, the employee must proceed immediately to the nearest collection center to provide a specimen for testing. The employer's Designated Representative fills out a Test Request form for the employee that can either be FAXed ahead or hand-carried by the employee to the collection facility. The superintendent/foreman should give the employee adequate time during normal shift hours to accomplish the collection - allowing for travel time to the collection site, wait time, and collection.

**For More Information: Contact Wolfgang Associates at (503) 297-4113 or at [stopdrugs@aol.com](mailto:stopdrugs@aol.com).**

# the Partnership Connection



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## In This Issue:

- Pension Trust's Real Estate Strategy
- Drug Testing Random Selection Process



**SUMMER BLAST**  
**SAVE THE DATE**  
**AUGUST 3RD**



## Information? Questions? Comments?

If you have any questions or comments about your Health & Welfare or Retirement Plans, please call our *Administrator of Employee Benefit Plans*:

**The William C. Earhart Company, Inc.**  
**503-282-5581**  
Outside the Portland Metro Area, call: 1-800-547-1314

**Write to us at:**  
P.O. Box 4148  
Portland, Oregon 97208  
**Visit our main office at:**  
3140 NE Broadway  
Portland, OR 97208  
Office Hours: M-F from 9 a.m. - 5 p.m.

**Website:**  
[www.wcearthart.com](http://www.wcearthart.com)

## The William C. Earhart Co. Services Directory

### Health Claims

*For questions on claims status call:*

**Kim** at 503-331-8238 or 1-800-547-1314 ext. 238  
[kimb@wcearthart.com](mailto:kimb@wcearthart.com)

**Stephanie W.** at 503-331-8236 or 1-800-547-1314 ext. 236  
[stephaniew@wcearthart.com](mailto:stephaniew@wcearthart.com)

### Pension

*For questions on Pension and Retirement call:*

**Micah** at 503-331-8224 or 1-800-547-1314 ext. 224  
[mcornell@wcearthart.com](mailto:mcornell@wcearthart.com)

**Simone** at 503-535-1419 or 1-800-547-1314 ext. 419  
[simoneg@wcearthart.com](mailto:simoneg@wcearthart.com)

### Contributions and Eligibility

*Premium payments, Hour bank, COBRA and Self-payments call:*

**Patty** at 503-331-8246 or 1-800-547-1314 ext. 246  
[pattym@wcearthart.com](mailto:pattym@wcearthart.com)

**Jaime** at 503-331-8256 or 1-800-547-1314 ext. 256  
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### Drug-Free Workplace

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