2020 Workforce Survey Results

Arizona Results

Total responses: 26, but number varies by question.

1. How has your firm’s headcount changed as a result of the pandemic? (Mark all that apply) Responses: 25

- Furloughed or terminated employees: 24%
- Terminated employees: 24%
- Furloughed employees: 16%
- Recalled or added employees: 20%
- Added employees: 12%
- Recalled employees: 8%
- No change: 68%

2. By what percentage has your firm’s headcount changed in the past 12 months? Responses: 26

- Reduced headcount: 38%
- Increased headcount: 42%
- No change: 19%
3. Did you furlough employees and then recall any? (Mark all that apply) Responses: 25

- No, did not furlough any employees: 84%
- Have not tried to recall furloughed employees: 8%
- Tried to recall furloughed employees: 8%

4. Among firms that tried to recall employees; Response: 2

- All furloughed employees reported when recalled: 50%
- Some recalled employees have refused to work: 50%
- Some cited preference for unemployment benefits: 50%
- Some cited virus concerns or family responsibilities: 50%
- Some cited other reasons (or unknown): 0%

5. How would you describe your current situation in filling hourly craft or salaried positions? Responses: 26
- Salaried: 25 Craft
- We have no openings for positions: 46%
- We are having a hard time filling some or all positions: 72%
- We are having no difficulty filling any positions: 15%
6. How many unfilled hourly craft or salaried positions did you have on June 30, 2020? Responses: 26 Salaried; 26 Craft

<table>
<thead>
<tr>
<th>Positions</th>
<th>Salaried</th>
<th>Craft</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0%</td>
<td>27%</td>
</tr>
<tr>
<td>1</td>
<td>0%</td>
<td>19%</td>
</tr>
<tr>
<td>2-5</td>
<td>0%</td>
<td>19%</td>
</tr>
<tr>
<td>6-10</td>
<td>0%</td>
<td>15%</td>
</tr>
<tr>
<td>More than 10</td>
<td>0%</td>
<td>23%</td>
</tr>
</tbody>
</table>

7. Has your firm added or increased use of the following to provide workers in the last 6 months? (Mark all that apply) Responses: 25

- Engaged with career-building program (e.g., high school, college, career & technical education) 48%
- Staffing firm (craft) 28%
- Implemented software to distribute job postings and manage applicants 16%
- Unions 16%
- Executive and non-craft worker search firm or professional employer organization 12%
- Added Instagram Live sessions and other online strategies that meet younger generations where they are 12%
- Engaged with government workforce development or unemployment agency 8%
- Applied for employee-based visas (e.g., H-1B, H-2B) 4%
- Sub- or specialty contractors 4%
- Other 8%
- No changes 16%
- Have not tried to hire 8%
8. Has your firm made changes in hiring, training or scheduling in the last 6 months? (Mark all that apply) Responses: 26

- Increased use of learning program with a strong online/video component (e.g., held classes using Zoom and Teams) 27%
- Overtime 23%
- Initiated or increased spending on training and professional development 19%
- Augmented/mixed/virtual reality training devices 15%
- Lowered hiring standards (e.g., education, training, employment or arrest record) 15%
- Initiated or increased online or mobile training options 15%
- Raised hiring standards 12%
- Decreased or eliminated spending on training and professional development 4%
- Added Lean construction personnel 0%
- Trained personnel in Lean construction methods 0%
- Other 0%
- No changes 27%
- Have not tried to hire 4%
9. If your firm is having trouble filling salaried positions, please indicate all the position types you are having trouble filling (Mark all that apply): 14

- Project managers/supervisors: 79%
- Safety personnel: 36%
- Engineers: 14%
- BIM personnel: 7%
- Quality control personnel: 7%
- Software/database personnel: 7%
- Architects: 0%
- Environmental compliance professionals: 0%
- IT personnel: 0%
- Lean construction professionals: 0%
10. If your firm is having trouble filling hourly craft positions, please indicate all the position types you are having trouble filling (Mark all that apply). Responses: 21

- Carpenters: 43%
- Equipment operators-cranes, heavy equipment: 43%
- Laborers: 38%
- Iron workers: 29%
- Concrete workers: 24%
- Truck drivers: 19%
- Cement masons: 14%
- Pipelayers: 14%
- Electricians: 10%
- Mechanics: 10%
- Pipefitters/welders: 10%
- Sheet metal workers: 10%
- Bricklayers: 5%
- Painters: 5%
- Plumbers: 5%
- Traffic control personnel: 5%
- Installers-drywall: 0%
- Installers-other: 0%
- Millwrights: 0%
- Roofers: 0%
11. Has your firm adjusted pay and/or benefits for hourly craft or salaried personnel in the last 6 months? (Mark all that apply) Responses: 26

- Increased base pay rates: 50%
- Provided incentives/bonuses: 31%
- Increased our portion of benefit contributions and/or improved employee benefits: 0%
- Reduced base pay rates: 0%
- Reduced our portion of benefit contributions and/or scaled back employee benefits: 0%
- No change: 46%

12. What technologies (hardware or software) have you employed recently to help alleviate any labor shortages your firm has experienced? (Mark all that apply) Responses: 26

- Project Management: 19%
- Document / File Management (e.g., high school, college, career & technical education): 15%
- Estimating: 15%
- Field Collaboration: 15%
- Workforce Management: 15%
- Bidding: 12%
- Cost Management/ ERP: 12%
- Adopted or increased Lean construction methods: 8%
- Reality Capture: 8%
- Virtual/Augmented/Mixed Reality: 4%
- Site Safety: 0%
- Other: 0%
- No changes: 62%
13. What impact, if any, has the pandemic had on your firm’s projects? (Mark all that apply) Responses: 25

- Some projects have been halted, postponed or canceled: 80%
- Scheduled projects have been postponed or canceled: 76%
- Projects under way have been halted: 32%
- We have won additional projects or add-ons to current projects: 16%
- No impact: 0%
- Projects have taken longer than we anticipated: 68%
- Costs have been higher than we anticipated: 48%
- We have put longer completion times into our bids or contracts: 28%
- We have put higher prices into our bids or contracts: 36%
- Projects have taken less time or cost less than we anticipated: 0%
- Other: 0%

14. What impact, if any, has the pandemic had on your firm’s safety and health program or performance? Responses: 26

- More reportable injuries and illnesses: 8%
- More jobsite hazards (physical and or behavioral) identified in inspection reports: 15%
- More workers compensation claims: 0%
- No change: 62%
- Fewer reportable injuries and illnesses: 15%
- Fewer jobsite hazards (physical and/or behavioral) identified in inspection reports: 0%
- Fewer workers compensation claims: 0%
15. If Congress takes further action to address the economic fallout from the coronavirus, which of these measures would be helpful to your business? (Mark all that apply) Responses: 26

<table>
<thead>
<tr>
<th>Measure</th>
<th>Percent</th>
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</thead>
<tbody>
<tr>
<td>Larger federal investment in infrastructure (e.g. transportation, schools, water, etc)</td>
<td>50%</td>
</tr>
<tr>
<td>Enact a “safe harbor” set of protocols to provide firms with protection from tort or employment liability for failing to prevent a covid-19 infection</td>
<td>50%</td>
</tr>
<tr>
<td>Addressing federal unemployment benefits that serve as artificial barriers to returning people to work</td>
<td>42%</td>
</tr>
<tr>
<td>Funding for state departments of transportation to help prevent project delays as a result of lost revenue from the pandemic</td>
<td>42%</td>
</tr>
<tr>
<td>Multi-year surface transportation reauthorization with higher funding levels</td>
<td>27%</td>
</tr>
<tr>
<td>Funding for direct federal and federal-aid construction projects to compensate employers during project delays or shutdowns due to coronavirus</td>
<td>27%</td>
</tr>
<tr>
<td>More funding for loan programs to maintain cash flows</td>
<td>27%</td>
</tr>
<tr>
<td>Enact a pandemic risk insurance/covid-19 business and employee continuity and recovery fund</td>
<td>27%</td>
</tr>
<tr>
<td>No additional legislation is needed</td>
<td>15%</td>
</tr>
<tr>
<td>Addressing the funding shortfalls for multi-employer pension plans</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
</tr>
</tbody>
</table>

16. When do you expect your firm’s volume of business will return to its normal level relative to one year earlier? Responses: 25

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volume of business already matches or exceeds year-ago level</td>
<td>24%</td>
</tr>
<tr>
<td>1-6 months</td>
<td>8%</td>
</tr>
<tr>
<td>More than 6 months (or never)</td>
<td>56%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>12%</td>
</tr>
</tbody>
</table>
17. How do expect your firm's headcount to change in the next 12 months? (Mark all that apply). Responses: 26

- Expect to furlough and or terminate employees: 31%
- Expect to terminate employees to reduce headcount: 23%
- Expect to furlough employees temporarily: 12%
- Expect to recall and or add employees: 19%
- Expect to add new employees: 15%
- Expect to recall employees: 4%
- No net change: 50%

18. How many total employees did your firm employ at all of its locations as of June 30, 2020? Responses: 26

- 1-49: 12%
- 50-249: 35%
- 250-499: 19%
- 500 or more: 35%
19. Estimate the total dollar amount of work your firm performed during the past 12 months. Responses: 26

- $10 million or less: 8%
- $10.1 million-$50 million: 31%
- $50.1 million-$500 million: 38%
- Over $500 million: 23%

20. Please indicate which of the following types of construction projects your firm performs (Mark all that apply) Responses: 26

- Building construction: 65%
- Federal and heavy: 46%
- Highway and transportation: 42%
- Utility infrastructure: 28%
- Other: 12%
21. When you self-perform construction work, do you operate as a union contractor or an open-shop contractor? Responses: 26

- We always operate as a union contractor: 12%
- We primarily operate as a union contractor but not always: 12%
- We primarily operate as an open-shop contractor but not always: 4%
- We always operate as an open-shop contractor: 65% (majority)
- We do not self-perform or directly hire craft personnel: 8%