



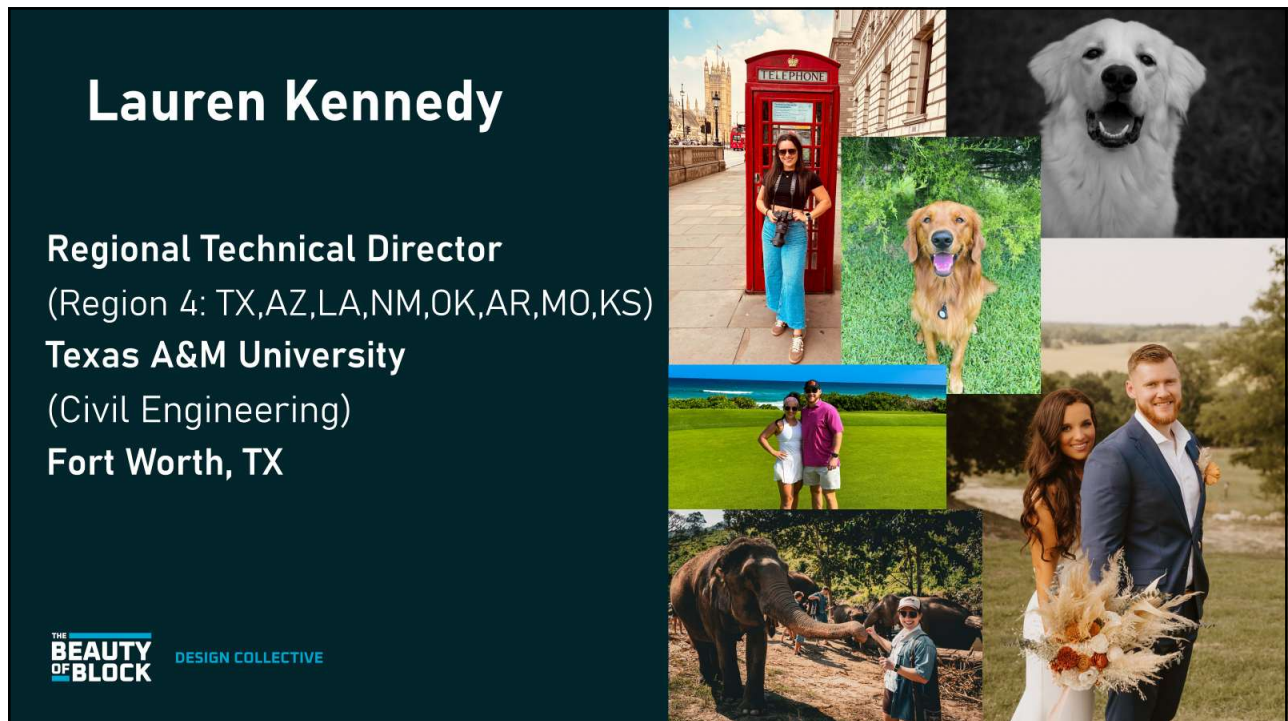

CONCRETE MASONRY
CHECKOFF
OVERVIEW

**The Concrete
Masonry Checkoff
and the Future of
the Industry**

 CONCRETE MASONRY
CHECKOFF

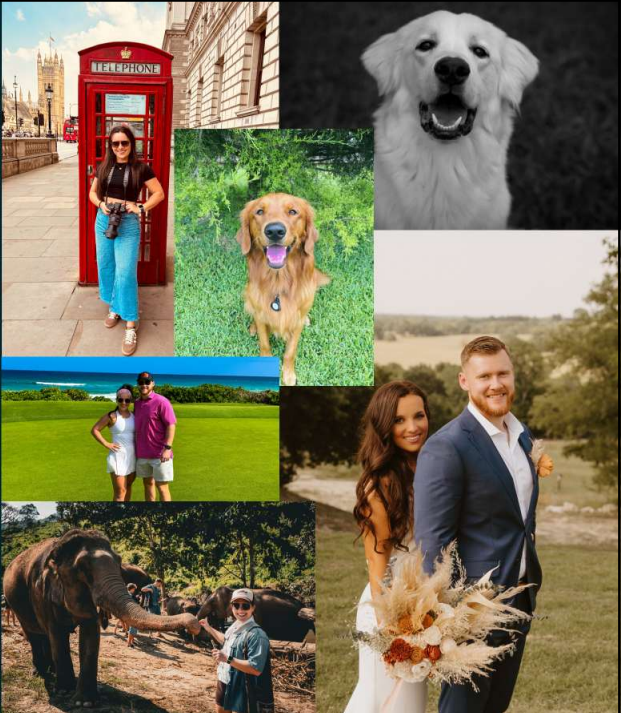
The slide features a dark teal background on the left with white text and a logo. On the right, there is a large, vibrant image of a brick wall where the bricks are replaced by a 3D geometric pattern of green and grey blocks, creating a modern architectural look.


1



Lauren Kennedy

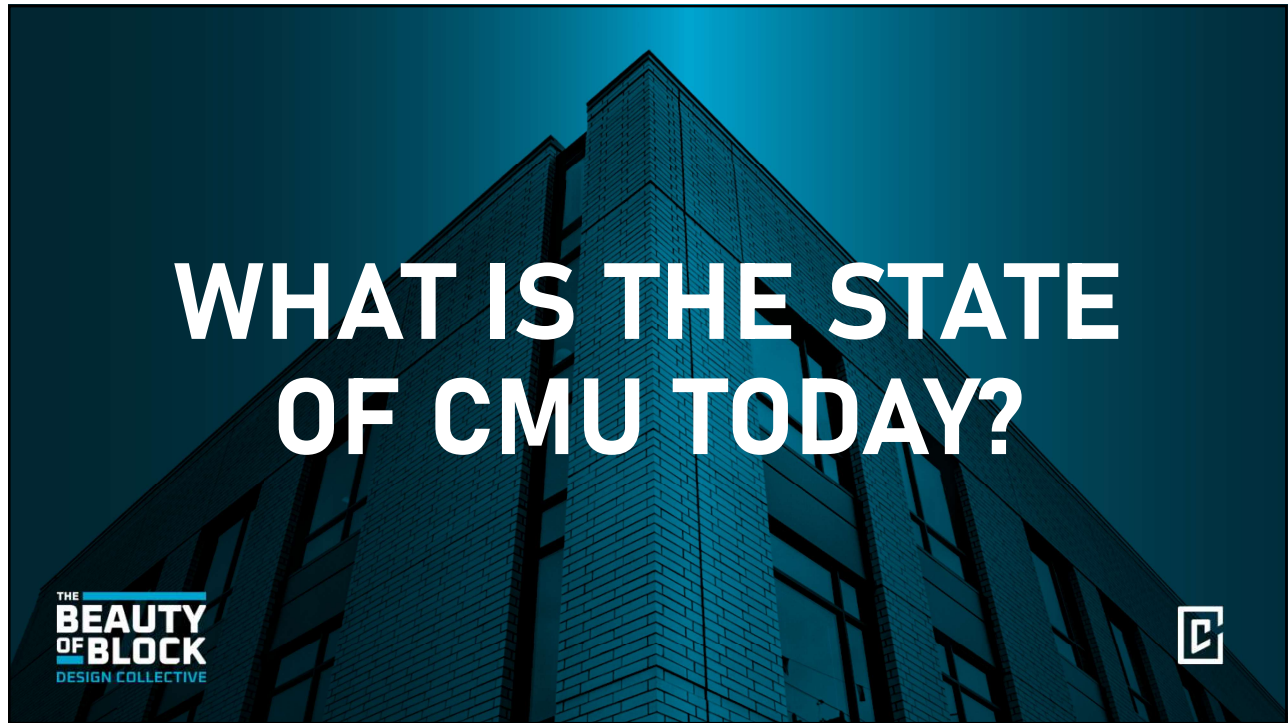
Regional Technical Director
(Region 4: TX,AZ,LA,NM,OK,AR,MO,KS)
Texas A&M University
(Civil Engineering)
Fort Worth, TX



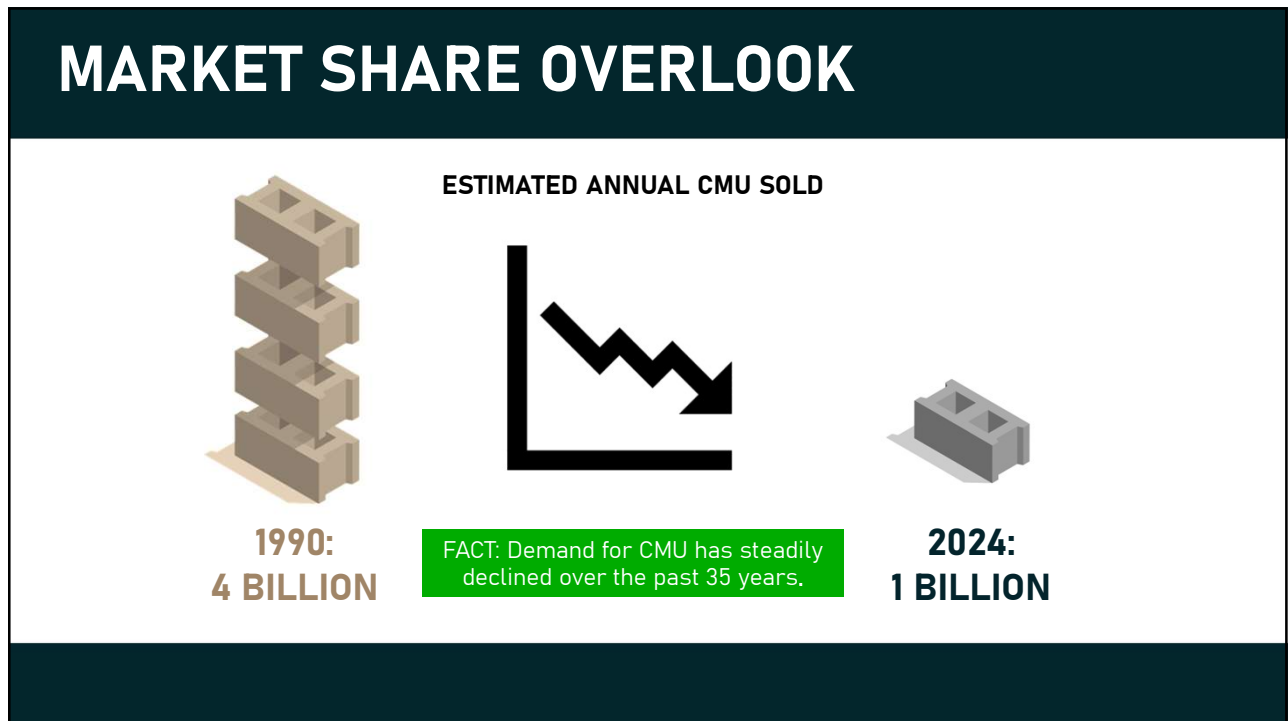


The slide has a dark teal background with white text on the left. On the right, there is a collage of six photographs: a woman in a black top and blue pants standing by a red telephone booth; a golden retriever sitting in a field; a white dog's face; a couple standing on a green golf course; a woman in a blue shirt interacting with an elephant; and a bride in a white dress holding a bouquet of flowers next to a groom in a blue suit.

2



3



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CONSTRUCTION TRENDS TODAY

- Longer design schedules, shorter construction schedules
- Owners demanding faster delivery (ex: data centers, healthcare, schools)
- Rising labor shortages and skill gaps
- Competing systems (precast, mass timber, modular) gaining traction



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INNOVATION = SURVIVAL



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WHAT DOES INNOVATION MEAN?

Innovation in business is the process of creating and implementing new ideas, methods, products, or services that add value, increase efficiency, and drive growth.

It's not just about invention—it's about applying fresh thinking to solve problems, meet customer needs, and stay ahead of competition.



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NETFLIX AS A CASE STUDY

- 1997 – DVD rentals by mail (disrupted Blockbuster)
- 2007 – Streaming launched (on-demand access)
- 2013 – Original content (*House of Cards*)
- 2016 – Global expansion (190+ countries)
- 2017+ – Data-driven personalization & AI recommendations
- 2021 – Interactive content & gaming ventures



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WHAT DID THIS DO FOR NETFLIX?

- Transformed from DVD mail service → global streaming giant
- Built a loyal customer base with personalization & convenience
- Created new revenue streams through original content
- Expanded worldwide, reaching 190+ countries
- Outpaced and replaced competitors like Blockbuster
- Became a leader in entertainment technology and culture



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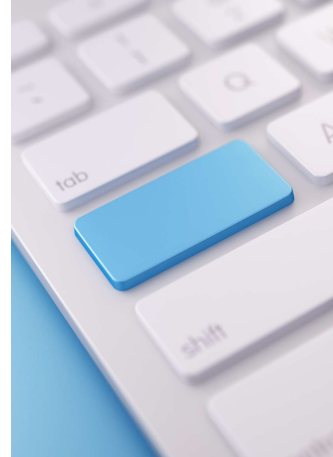
HOW DO WE INNOVATE THE MASONRY INDUSTRY?



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A PARADIGM SHIFT

- Little to no masonry education in schools
- Engineers have tight schedules → no time to research what they don't know
- Contractors have strong preferences for how masonry is installed
- Local material availability drives design choices
- Without expertise, designs end up inefficient or avoided



FIVE-YEAR STRATEGIC PLAN



	Revenue Billions of USD	Market Share
Concrete Masonry Units	\$2.432 B	5.3%
Softwood Lumber	\$16.44 B	35.8%
Structural Steel	\$19.2 B	41.9%
ICF	\$0.369 B	0.8%
Tilt-up Concrete	\$7.423 B	16.2%
Total	\$45.866 B	100%

Table 1: National Market Size and Share for CMUs and Competitive Products

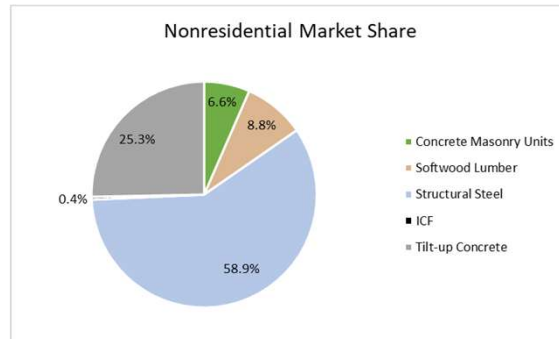
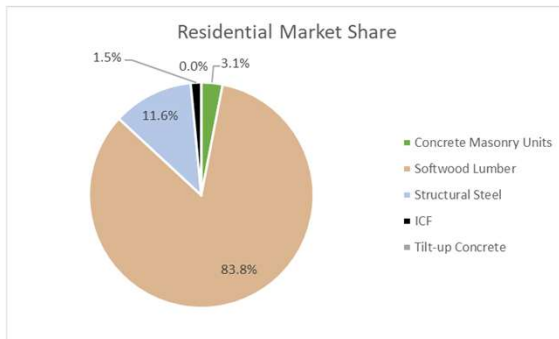
	Revenue Billions of USD					
	Region 1	Region 2	Region 3	Region 4	Region 5	Total
Concrete Masonry Units	\$0.264 B	\$1.109 B	\$0.291 B	\$0.424 B	\$0.343 B	\$2.432 B
Softwood Lumber	\$1.715 B	\$4.275 B	\$3.274 B	\$2.641 B	\$4.5377 B	\$16.442 B
Structural Steel	\$1.75 B	\$6.386 B	\$2.801 B	\$2.749 B	\$5.515 B	\$19.200 B
ICF	\$0.04 B	\$0.108 B	\$0.075 B	\$0.087 B	\$0.058 B	\$0.369 B
Tilt-up Concrete	\$0.806 B	\$2.184 B	\$1.508 B	\$1.755 B	\$1.17 B	\$7.423 B
Total	\$4.926 B	\$14.938 B	\$8.619 B	\$8.197 B	\$12.553 B	\$45.866 B

	Market Share				
	Region 1	Region 2	Region 3	Region 4	Region 5
Concrete Masonry Units	5.8%	7.9%	3.7%	5.5%	3.0%
Softwood Lumber	37.5%	30.4%	41.2%	34.5%	39.0%
Structural Steel	38.2%	45.4%	35.2%	35.9%	47.4%
ICF	0.9%	0.8%	0.9%	1.1%	0.5%
Tilt-up Concrete	17.6%	15.5%	19.0%	22.9%	10.1%

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National Residential and Nonresidential Market Usage and Share

	Revenue (\$ billion)	Market Proportion		Revenue (\$ billion)		Market Share	
		Residential	Nonresidential	Residential	Nonresidential	Residential	Nonresidential
Concrete Masonry Units	\$ 2.432	20.8%	79.2%	\$ 0.506	\$ 1.926	3.1%	6.6%
Softwood Lumber	\$ 16.442	84.3%	15.7%	\$ 13.861	\$ 2.581	83.8%	8.8%
Structural Steel	\$ 19.200	10.0%	90.0%	\$ 1.920	\$ 17.280	11.6%	58.9%
ICF	\$ 0.369	67.5%	32.5%	\$ 0.249	\$ 0.120	1.5%	0.4%
Tilt-up Concrete	\$ 7.423	0.0%	100.0%	\$ -	\$ 7.423	0.0%	25.3%
	\$ 45.866			\$ 16.536	\$ 29.330		



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MARKET SHARE 5.3% → 6.4%

	REVENUE - BILLIONS OF USD	MARKET SHARE
Concrete Masonry Units	\$2.432 B	5.3%
Softwood Lumber	\$16.44 B	35.8%
Structural Steel	\$19.2 B	41.9%
ICF	\$0.369 B	0.8%
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TOTAL	\$45.866 B	100%

20% Market Share Growth In 5 Years "5-20"



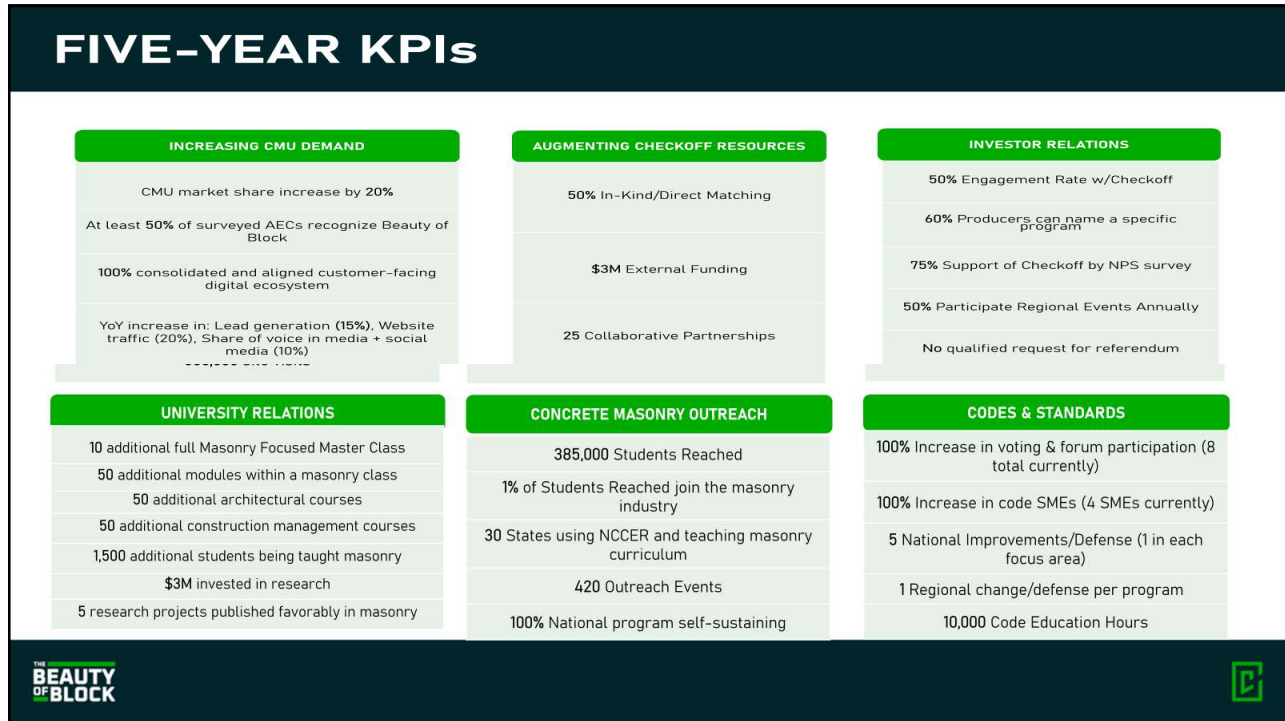
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FIVE-YEAR KPIS

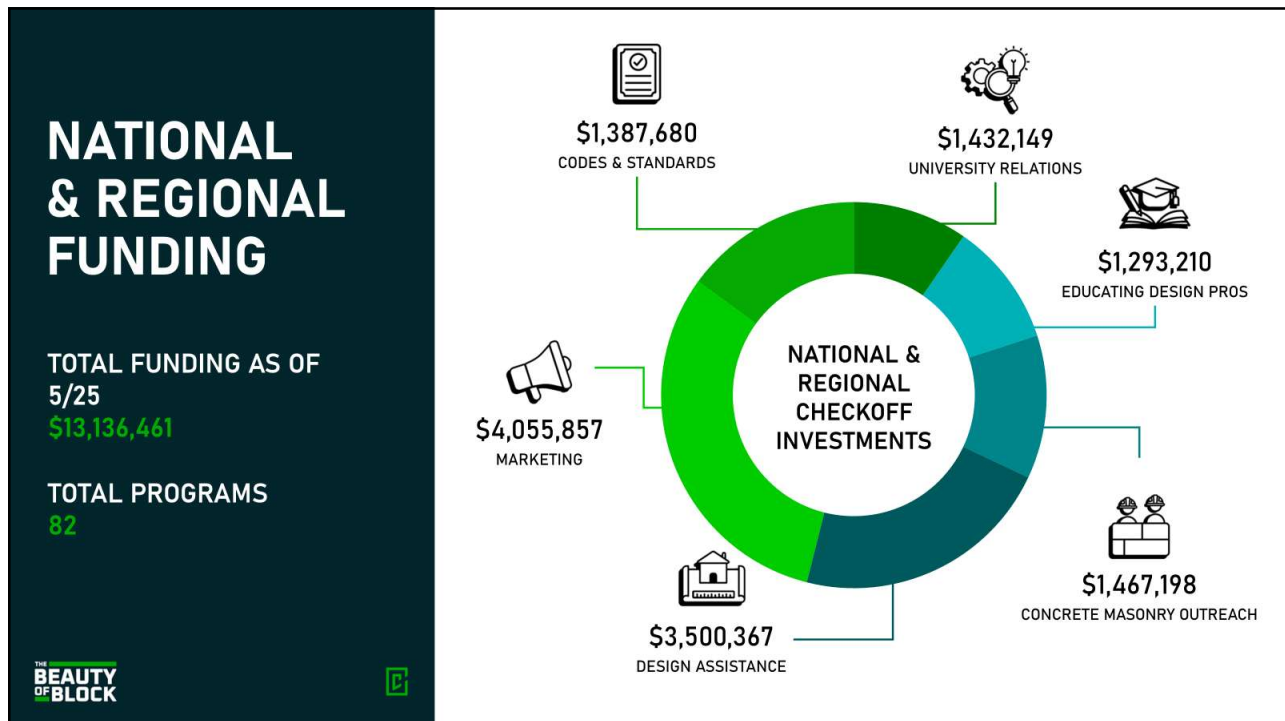
MARKETING	DESIGN ASSISTANCE	EDUCATING DESIGN PROS
5,000 Market Qualified Leads	750 Educational Events	11,840 Education Hours
25,000 AECs engagements	25,000 AEC Interactions (5,000 direct interactions; 20,000 education interactions)	100+ Additional Courses
50,000 CRM data points	5,000 Projects Assisted	10,000 New LMS Accounts
500,000 site visits	3,000,000 Blocks Added	100,000 Design Pros Reached
UNIVERSITY RELATIONS	CONCRETE MASONRY OUTREACH	CODES & STANDARDS
10 additional full Masonry Focused Master Class	385,000 Students Reached	100% Increase in voting & forum participation (8 total currently)
50 additional modules within a masonry class	1% of Students Reached join the masonry industry	100% Increase in code SMEs (4 SMEs currently)
50 additional architectural courses	30 States using NCCER and teaching masonry	5 National Improvements/Defense (1 in each)
50 additional construction management courses		75% Support of Checkoff by NPS survey
100% consolidated and aligned customer-facing digital ecosystem	\$3M External Funding	50% Participate Regional Events Annually
YoY increase in: Lead generation (15%), Website traffic (20%), Share of voice in media + social media (10%)	25 Collaborative Partnerships	No qualified request for referendum



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THAT'S THE BEAUTY OF BLOCK.

At its core, this campaign celebrates the unique and often-overlooked benefits of concrete masonry. While many associate our product with brute strength, that's just the beginning—it's safe, stunning, and a model of efficiency.

Beauty of Block encompasses both structural integrity and architectural versatility. Whether visible or behind-the-scenes, the advantages of CMU are felt every day.

From schools, hospitals, and hotels to homes and apartment complexes, any project can benefit from the all-around appeal of concrete masonry.

The *Beauty of Block* manifests in many ways:

- Structures that stand their ground—*that's the Beauty of Block.*
- Avoiding downtime after disaster strikes—*that's the Beauty of Block.*
- Keeping insurance costs in check—*that's the Beauty of Block.*
- Little to no maintenance—*that's the Beauty of Block.*
- Low embodied carbon over its lifetime—*that's the Beauty of Block.*
- Locally sourced and skillfully set—*that's the Beauty of Block.*

THE BEAUTY OF BLOCK
LEARNING HUB

THE BEAUTY OF BLOCK
DESIGN COLLECTIVE

THE BEAUTY OF BLOCK
CONCRETE MASONRY CHECKOFF

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BEAUTY OF BLOCK DIVING DEEPER REGIONALLY

REGION 1

Media Placements + Geofencing

REGION 2

Omnichannel Beauty of Block Pilot

REGION 3

Media Placements, Paid + Social

REGION 4

Trade Shows-n-Codes

REGION 5

Media Placements + Sales Kit

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MAXIMIZING CONTENT ACROSS PLATFORMS

ACCREDITED PRESENTATIONS

FACT SHEET & TALKING POINTS

WEBSITE LANDING PAGE

DIGITAL ADS

VIDEO SERIES

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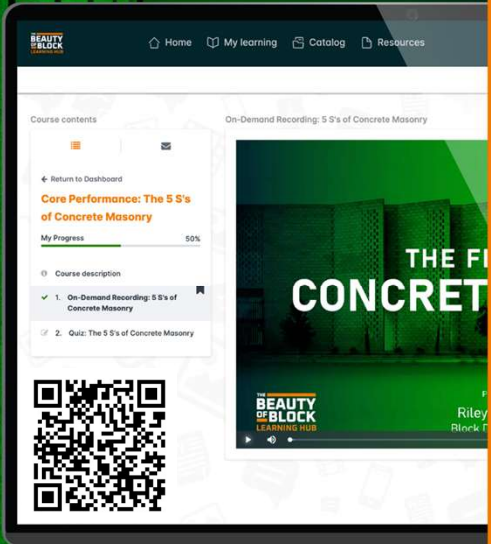


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THE BEAUTY OF BLOCK LEARNING HUB

NOW IN SESSION.

A free-to-access educational platform designed to deepen expertise on all things concrete masonry. Explore learning courses covering structural applications, sustainable design strategies and innovative uses of concrete masonry through on-demand courses, live webinars and downloadable resources.



The screenshot shows a user interface for a course titled "Core Performance: The 5 S's of Concrete Masonry". It includes a progress bar at 50%, a course description, and a list of items: "On-Demand Recording: 5 S's of Concrete Masonry" and "Quiz: The 5 S's of Concrete Masonry". A QR code is visible in the bottom left corner of the interface.

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CODES & STANDARDS






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NATIONAL BUILDING CODES UPDATE

JULY 1, 2024 –
JUNE 30, 2025

4 → 12
Subject Matter
Experts

2,930
Codes Contact Hours

2,000+
ICC Code Changes
Reviewed & Positions
Developed

1
New Codes Director
(Ben Nantasai)

\$472,141 invested
Checkoff: \$330,796
CMHA: \$141,344

FiscalNote
State/Local Codes
Monitoring
Implemented



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KEY ACHIEVEMENTS BY FOCUS AREA

- **Structural:** 11 proposals submitted; dry-stack masonry added to 2028 TMS 402/602; active roles in ICC, ASCE 7, ATC 136, FEMA guidance
- **Fire Safety:** Defended non-combustible provisions in IBC; added exemptions for masonry for combustibility testing, chaired wildfire hazard area working group
- **Energy/Envelope:** ASHRAE 90.1 reduced energy credit requirements; state adoptions of ACI/TMS 122 supported
- **Materials Science:** ASTM C90 updated to include 'dry-cast' CMU; groundwork for carbon sequestration standards
- **Environmental Technologies:** Leadership in carbon accounting (NIST AC3, SEI); public comments to LEED v5, ASHRAE 240P



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OUR TEAM

Our team of Regional Technical Directors is backed by a trusted network of practicing designers and architects with extensive masonry experience. Together, we bring a shared commitment to problem-solving, partnership, and delivering support at the highest possible level.

Region 1: Chuck Rotondo

CRotondo@blockdesign.org | 609.578.1568

Region 2: TBD

Region 3: Tino Kalayil

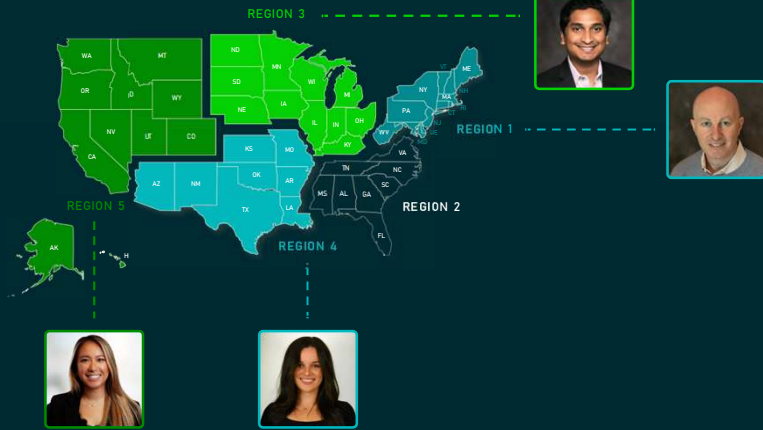
TKalayil@blockdesign.org | 224.639.2164

Region 4: Lauren Kennedy

LKennedy@blockdesign.org | 817.301.4296

Region 5: Irene Li

ILi@blockdesign.org | 773.306.6252



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STRATEGIC INITIATIVES



Developing Resources



Engaging AECs



Equipping the Industry



Building Design Assist Hub



Delivering Project Proposals



Driving Delegated Design



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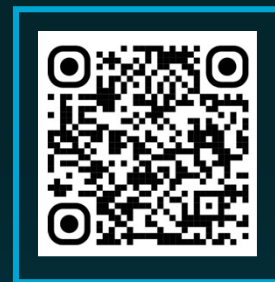
RESOURCES

Blockdesigncollective.com

VISION:
One-stop shop for
concrete masonry
resources



Scan the QR
code to access

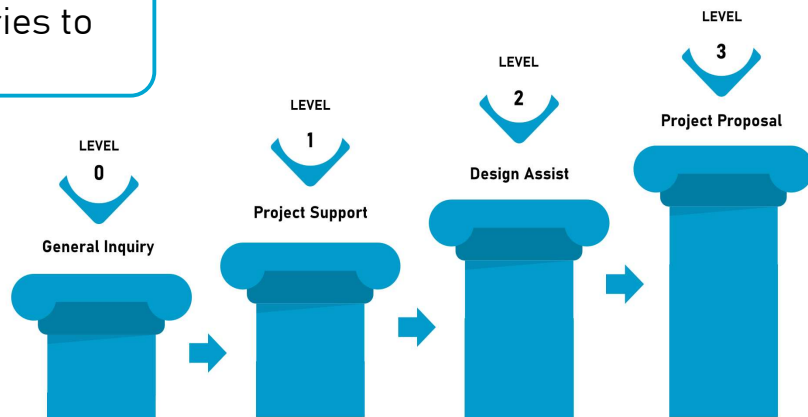


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PROJECT ASSISTANCE

VISION:
From design inquiries to blocks added

READY TO SUPPORT
FROM GENERAL
INQUIRIES TO PROJECT
PROPOSALS



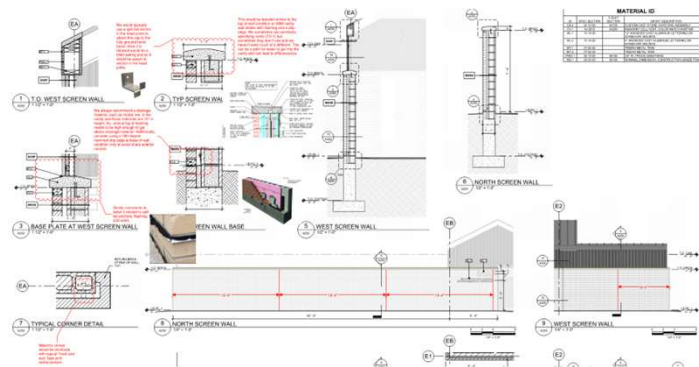
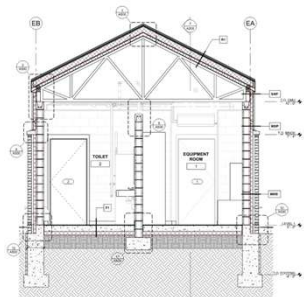
DESIGN COLLECTIVE



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PROJECT SUPPORT LEVEL 1

Drawing Review leading to added CMU on jobs



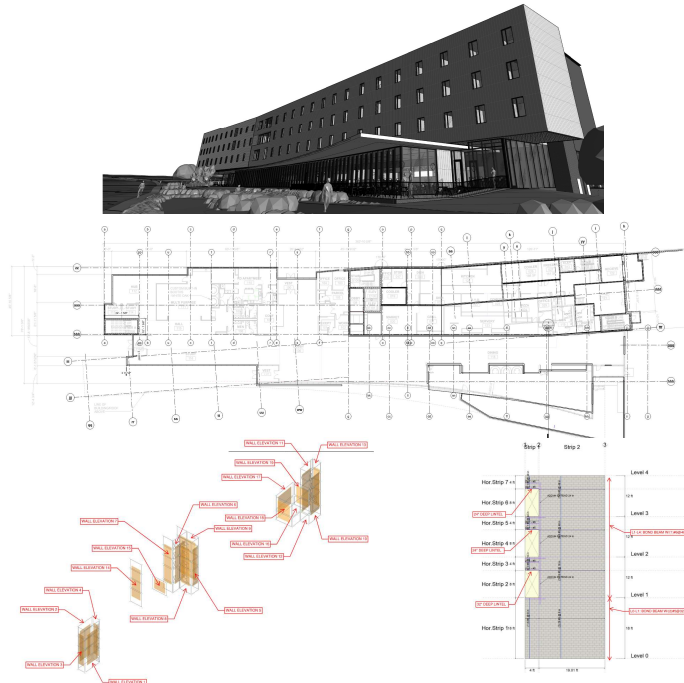
DESIGN COLLECTIVE

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DESIGN ASSIST LEVEL 2

Influencing CMU use through structural design assist

THE BEAUTY OF BLOCK DESIGN COLLECTIVE

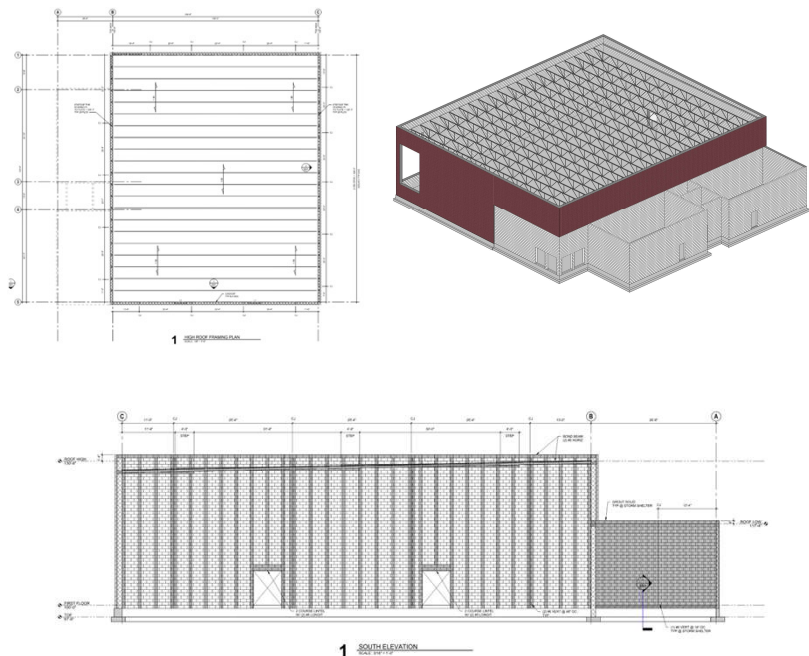


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PROJECT PROPOSAL LEVEL 3

Preconstruction Support

THE BEAUTY OF BLOCK DESIGN COLLECTIVE



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STAY UP TO DATE WITH THE MOST RECENT HIGHLIGHTS VIEW THE Q2 UPDATE

Q1 & Q2 Achievements

Q1 & Q2 SUMMARIES: OUTREACH

IN THE FIRST HALF OF THE YEAR, OUR CONCRETE MASONRY OUTREACH EFFORTS MADE MEASURABLE PROGRESS IN CLASSROOM, COMPETITION, AND CAREER PIPELINES ACROSS THE COUNTRY.

We hosted a total of 25 high school outreach events
reaching **7,000 students** with hands-on learning and industry insight.

As part of that outreach, we provided masonry curriculum and hands-on training to over 7,000 students.

HANDS-ON LEARNING PLAYED A KEY ROLE.

Our hands-on learning programs gave students the chance to put their learning into practice. They not only experienced masonry work and the industry, but they also learned the value of hands-on learning. This hands-on learning is supported by hands-on learning opportunities within the masonry industry.

Recognizing the importance of strong instruction, we also focused on hands-on learning by offering hands-on learning opportunities to our students. This hands-on learning is supported by hands-on learning opportunities within the masonry industry.

Q1 & Q2 SUMMARIES: CODES & STANDARDS

IN THE FIRST HALF OF THE YEAR, OUR CODES AND STANDARDS EFFORTS REMAINED FOCUSED ON REFINING CONCRETE MASONRY'S VALUE, DRIVING POLICY LEVEL AND BUILDING LONG-TERM MOMENTUM ACROSS NATIONAL, STATE AND LOCAL LEVELS.

Across 31 and 32, **15** related masonry projects delivered **1,680** hours of code work.

Based on environmental performance, structural of systems and fire safety.

Their efforts contributed to **2** national code changes and **11** total code changes at the state level.

On a local front, we passed **100** codes and standards in **10** states. We also worked with **10** masonry groups on planning and code updates and delivered **10** hours of code work. Through meetings with elected officials and stakeholder groups.

AT A STATE LEVEL

We achieved **100%** compliance in **10** states. We also worked with **10** masonry groups on planning and code updates and delivered **10** hours of code work. Through meetings with elected officials and stakeholder groups.

5 Year Goal Progress

BLOCK DESIGN ASSISTANCE

YEAR 1 KPIs

Year 1 of 5 Progress

Year 1 Goals	Current Standing
NO. OF EDUCATION EVENTS	33
NO. OF HIGH SCHOOL OUTREACH EVENTS	25
NO. OF PROJECTS ASSISTED	82
NO. OF PROJECTS NOT ASSISTED	6

MARKETING

YEAR 5 GOALS

Year 1 of 5 Progress

Current Standing	Year 5 Goals
LEAD-GEN INTERACTIONS	5,000
LEAD-GEN INTERACTIONS	25,000
LEAD-GEN INTERACTIONS	50,000
LEAD-GEN INTERACTIONS	500,000

Scan the QR code to access

40