

2023 **BLUE**  **HAWK**

*Annual Conference*

JW MARRIOTT  
AUSTIN, TEXAS

APRIL 30 - MAY 2, 2023



# Hotel Information

**JW MARRIOTT**  
110 E. 2nd Street  
Austin, TX 78701  
512-474-4777



Located in the heart of downtown Austin, the JW Marriott Austin offers luxury comfort and sophisticated amenities. The urban resort features an on-site spa, room service, seven bars, four restaurants, Starbucks® and the largest guest rooms in the city with floor-to-ceiling windows.

## ROOM RATE

\$297 per night plus tax, single/double occupancy.

*Rates are guaranteed through March 14 or until hotel block is full, whichever occurs first.*

# Hotel Reservations

Go to [www.bluehawk.coop/events](http://www.bluehawk.coop/events), click on the Hotel Reservation link to complete your hotel reservation online.

Or call 512-474-4777, be sure to ask for the BLUE HAWK Group Rate.

# Travel Information

 Austin-Bergstrom International Airport

Distance from Hotel 6.6 Miles  
Phone Number 512-530-2242

 Transportation from Airport  
SuperShuttle

Uber  
Lyft

JW Marriott



# Conference Registration

**REGISTER ONLINE:** [www.bluehawk.coop/events](http://www.bluehawk.coop/events)

Please complete a separate registration form for each meeting attendee (other than a spouse or guest who is only participating in social activities). If your spouse is participating in the meeting portions of the event please fill out a separate form for them also.

Conference registration and hotel reservations are due no later than Monday, March 14, 2023, and must be completed separately.

# On-site Conference Check-in

Registration is open Sunday, April 30, 2:00 - 5:00 pm in the JW Grand Foyer, level 4. Stop by and pick up your name tags and meeting packets with a detailed conference schedule.

# Attire

**Meet & Greet:** Business Casual

**Meeting:** Business Casual

**Rock the Hawk:** It's time to let your hair down and rock on with the BLUE HAWK Battle of the Bands! So, dust off your favorite 80's graphic tee, your faded cowboy boots, or just roll in your conference attire and enjoy a great show.

# Schedule of Events

## SUNDAY, APRIL 30

2:00 pm - 5:00 pm  
Conference Registration

2:30 pm - 5:30 pm  
Buzzworthy Workshops *See pages 4 & 5*

5:30 pm - 6:30 pm  
Next Level Kick Off *See pages 4 & 5*

6:00 pm - 6:30 pm  
New Member/First-Time Attendee  
Meet & Greet

6:30 pm - 8:00 pm  
Meet & Greet

## MONDAY, MAY 1

7:00 am - 8:00 am - Members Only Breakfast

8:00 am - 9:45 am  
Member-Owner Meeting - *Mandatory*

10:00 am - 12:00 pm  
Peer-2-Peer Networking Groups  
& Role Roundtable Discussions

10:30 am - 3:30 pm  
Dripping Springs Wine Tour  
*Guest Only Event - Optional*

12:00 pm - 1:15 pm  
Awards Lunch

1:30 pm - 5:15 pm  
Face-to-Face Meetings - *Mandatory*  
& Alliance & Solution Partner Center

6:30 pm - 9:00 pm  
*Rock the HAWK!* Battle of the Bands

## TUESDAY, MAY 2

7:00 am - 7:30 am - Attendee Breakfast

7:30 am - 12:30 pm  
Face-to-Face Meetings - *Mandatory*  
& Alliance & Solution Partner Center

2:00 pm - 4:30 pm - *Optional Activity*  
BLUE HAWK Gives Back - LifeWorks

## WEDNESDAY, MAY 2

11:00 am - 5:30 pm  
Hill Country Distillery, Brewery &  
BBQ Tour

# Face-to-Face

## MONDAY MAY 1

Face-to-Face meetings are short 10-minute pre-scheduled meetings between Member-Owners and Vendor Partners to explore business opportunities.



Face-to-Face selection forms will be available online in February. Notification will be sent out when selection forms are posted. Members, Vendor Partners, will specify who they would like to meet with, and BLUE HAWK will establish appointment schedules for all attendees. Every effort will be made to accommodate your appointment preferences. Members will have the option to select Alliance Partners and Solution Partners they would like to meet with also.

Each Member will have approximately 20-30 appointments. Members are required to attend all scheduled appointments to comply with the Minimum Standards of Member Participation. The Vendor Partner schedules are full based on the number of selected appointments. Member schedules contain gaps. Please take those opportunities to visit the Solution Partner Center.

# Solution Partner Center

Lower your expenses and streamline your operations by visiting our BLUE HAWK Solution Partners during your Face-to-Face Meeting breaks. Solution Partners are "Value-Added Business Services" negotiated and endorsed by BLUE HAWK on behalf of our Member-Owners. Solution Partners offer a valuable service by reducing your operating costs, enriching your customer relationships, and growing your business.



# Guests

Bring your guest to enjoy Austin and the amenities of the JW Marriott. The hotel features an on-site, luxurious spa, state-of-the-art fitness center, and heated rooftop pool.

***A Guest Fee of \$200 will be charged for all guests attending the conference to help offset the cost of their attendance.***

# BUZZWORTHY Workshops

**SUNDAY,  
APRIL 30**

Six workshops for Members will be held on Sunday afternoon prior to the Meet & Greet.

These Workshops will focus on important BLUE HAWK initiatives.

You can sign up to attend the workshops on the conference registration form.

## NEXT LEVEL



### NEW BLUE HAWK MARKETPLACE

**2:30 pm - 3:15 pm**

*Martin Rosales, MarketPush*

B2B Marketplaces have become the fastest-growing ecommerce channel within the distribution space. In this workshop, we will discuss BLUE HAWK and IMARK Plumbing's new joint marketplace and how it will provide our Member's a competitive advantage within the distribution space. In addition, you will learn best practices to help create an incremental business from your existing customers, and how the marketplace will help you find and gain new customers through additional value you can provide.



### ERC TAX CREDIT

**2:30 pm - 3:15 pm**

*Jerry Smith, CardConnect AIP  
Nathan Shepard, LG Resources*

ERC Specialists (powered by CardConnect AIP & LG Resources) have helped over 6,300 small and medium businesses recover refunds of overpaid Federal Payroll taxes through ERCs, resulting in 1.4 billion in credits.



It's important to note that Employee Retention Credits (ERC) are not loans. They are refunds issued for overpayment of federal payroll taxes, allowing businesses to receive checks from the IRS for up to \$26,000 for each qualifying employee.

During the COVID-19 pandemic, many businesses received forgivable PPP and EID loans, yet many companies do not know about nor take advantage of the ERC program, another legitimate provision of the CARES Act. Qualifying for and applying for ERC refunds can be complex.



### THE DASHBOARD

**3:30 pm - 4:15 pm**

*Jackson Zingsheim & Aaron Claycomb, Rebate.ai*

BLUE HAWK's web-based analytics platform that shows near real-time rebate performance and conversion opportunities. Members, Vendor Partners and Co-op Staff are using this system to track and maximize rebate & incentive opportunities.



Join us for this workshop to see the new functionality updates and get your questions answered and to learn more about how to use The Dashboard to its full capabilities.

### NEXT LEVEL LEADERSHIP DEVELOPMENT PROGRAM KICK OFF

**5:30 pm - 6:30 pm**



## ENERGY SOLUTIONS

*Howard Merson, Energy Solutions*

**3:30 pm - 4:15 pm**

Learn about utility energy efficiency rebate programs and how distributors nationwide in the HVAC/R, Plumbing, and Electrical technology sectors can bolster sales, bottom-line profitability and expand their market share through midstream program incentives. This session will also cover the recently launched multi-billion dollar Inflation Reduction Act (IRA) funding opportunities available through federal tax credits and incentives that can be applied to drive energy-efficient equipment sales further. With over 25 years of experience implementing more midstream and upstream programs in North America than any other company, Energy Solutions, a new BLUE HAWK Solution Partner, provides cost-effective, market-driven solutions that maximize incentive dollars for Members.



## ALTERNATIVE SUCCESSION PLANNING OPTIONS

*Business Owners only session*

**4:30 pm - 5:30 pm**



*Moderator: Seth Gordon, Glacier Supply Group*

*Panelists:*

*Lauren Roberts, cfm Distributors*

*Rolly Johnson, Glacier Supply Group*

*David McIlwaine, HVAC Distributors*

*Stephen Torrice, S.G. Torrice*

*Rhonda Wight, Refrigeration Sales Corp*



Join fellow BLUE HAWK Members to learn about the different ways their companies have approached succession planning. We will discuss the BLUE HAWK Growing Forward Acquisition Program, ESOP, Private Equity, and outside management. It's important to have a plan. Learn about the opportunities and potential downfalls for each option from wholesalers who have gone through the process.



## BLUON

*Drew Eckman & Will Rawley, Bluon*

**4:30 pm - 5:15 pm**

160,000 HVAC technicians are members of the Bluon Community so they can access product manuals, view parts lists, get tech support, and communicate with their local Distributor. Bluon's vision is to connect these technicians with brick and mortar distribution through a platform that provides more data, increased efficiencies, and fewer mistakes. Attend the Bluon Workshop to learn more about how you can join the 400+ BLUE HAWK stores who currently use Bluon to access HVAC data and communicate with their customers.

Calling all future leaders, industry go-getters, and up-and-comers! Join us for happy hour and help craft BLUE HAWK's new Next Level Leadership Development Program. Together, we'll create the program's fundamentals, and discuss educational / networking opportunities based off your feedback.



# BLUE HAWK

PRESENTS

# ROCK

the Hawk

MONDAY, MAY 1

7:00 PM @ MAGGIE MAE'S

ARE YOU MUSICALLY TALENTED?  
WE WANT TO HEAR IT!

Dust off your old 80's graphic tees, faded cowboy boots, and enjoy a great show for BLUE HAWK - BY BLUE HAWK! All Members, Vendor Partners, Alliance Partners, Solution Partners, and Guests are invited to enjoy the show AND participate!

SIGN UP to join a band through the online registration process. Singers and musicians of all talent levels are welcome!

SPONSORED BY:



Gray Metal Products Inc.  
Gray Metal South, Inc.  
Snap-Rite  
Manufacturing, Inc.  
Quality Flex  
GRAY FLEX SYSTEMS, INC.

## Dripping Springs Wine Tour

MONDAY, MAY 1  
10:30 am - 3:30 pm  
\$175 per person

**SPOUSE & GUEST ONLY -  
OPTIONAL EVENT**

*Note: This takes place during the Face-to-Face Meetings.*

Guests will depart the hotel on a private shuttle to enjoy a wine tasting tour in beautiful Texas Hill Country.

The first stop will be at Driftwood Estate Winery. Driftwood radiates Texas pride in its production of high-quality wines made from 100% Texas grapes. Driftwood Estate Winery sits on a bluff overlooking their Estate Vineyard and the Hill Country from which visitors can enjoy award-winning wines.

Next the tour will move to Fall Creek Winery. Guided wine tasting, with lunches ordered from Turcotte Delicatessen for the group to eat during their tasting. Hill Country feel and plenty of photo opportunities!





**TUESDAY, MAY 2**

**2:00 pm - 4:30 pm**

**\$45 per person**

### **BLUE HAWK GIVES BACK**

Join us as we give our time and talents to clean up and repair one of Austin's three Lifeworks facilities.

The cost of this event includes lunch, a volunteer shirt and transportation.

Space is limited, sign up now to Give Back!

**ABOUT LIFEWORKS:** Every year, LifeWorks advocates for more than 4,000 youth and families, many of whom are facing life's most difficult challenges, including homelessness, trauma, and abuse.

Each of LifeWorks' 19 programs, as well as their collaborative, research and advocacy efforts, are designed to promote these three pillars:

- Everyone deserves a home
- Everyone deserves to work
- Everyone deserves a chance to heal

**SPONSORED BY:**



## *Hill Country Distillery, Brewery & BBQ Tour*

**WEDNESDAY, MAY 3**

**11:00 am - 5:30 pm**

**\$185 per person**

### **OPTIONAL EVENT**

The first stop on this tour is Treaty Oak Distilling Co. — the 4th oldest distillery in Texas, and until 1996, it was the first legal distillery. Treaty Oak Distilling Co. specializes in Bourbon and Gin, but truly has something for all - seasonal craft cocktails, craft beer, Texas wine, and some of the best BBQ in the Texas Hill Country.

Next up is Vista Brewing - a tour favorite! Their beer is brewed by a passionate, award-winning brewmaster that creates incredible beer. Unique to Vista Brewing is their Collaboration Series, highlighting local Texas artisans and non-profits and together developing a recipe and brewing together. Their beers are influenced by European traditions- balanced and approachable.

