

**Construction Owners Association of America**

# **CHAPTER GUIDEBOOK**

**March 2024**



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## **INTRODUCTION**

The Construction Owners Association of America (COAA) exists to help facility/project Owners be better Owners. COAA chapters support that mission on a grass-roots level and provide the opportunity for members and non-members within a state or region to learn, connect, and periodically gather.

More specifically, COAA chapters:

- Are grass roots, local/regional arms of the association, not independent entities
- Offer education, networking opportunities, and peer-to-peer engagement at the local/regional level
- Extend national offerings and content to a local/regional community since some Owners within that region may never attend a national conference or other event
- Provide opportunities for Owners and their industry partners (product and service providers) to build & maintain healthy professional relationships
- May partner with the local chapters of other industry organizations to reach new audiences and ensure the Owner's perspective is heard and better understood
- Promote a collaborative approach to project delivery by leveraging The COAA Way (see below)

Chapters of COAA, and their respective leaders, should:

- Support the pursuit and achievement of COAA's strategic goals (see below)
- Strive to recruit, retain, and engage members (particularly Owners)
- Continuously recruit, support, and recognize volunteers and sponsors
- Identify emerging issues and other content of interest to Owners
- Deliver the COAA brand consistently and maintain the organization's reputation for high quality, Owner-centric content and events

This document is meant to aid chapter leaders and volunteers by providing both strategic and tactical guidance, suggestions, and best practices. The content of this guidebook is drawn both from 30 years of COAA's existence and general association best practices.

*NOTE: COAA chapters have traditionally been associated with a particular state or region and centered on in-person gatherings. COAA acknowledges that other types of chapters are possibly viable and worth considering. For example, sector-specific chapters (e.g., a "healthcare chapter" or "airports chapter") that exist without borders and gather mostly in the virtual realm.*

# **COAA OVERVIEW**

## **Mission & Vision**

Mission | COAA promotes facility Owner leadership and continuous improvement in the planning, design, and construction process through education, collaboration, and information exchange.

Vision | COAA aspires to be:

- The **leading** facility Owner organization in the planning, design, and construction process.
- An **inclusive** membership, representing the entire spectrum of careers and market segments.
- A **collaborative network** of chapters and communities of practice across the U.S. that members identify as their professional home.
- **THE resource** for Owners seeking to continuously improve the quality of project delivery.
- A driver of evolution in the construction industry.

## **Value Proposition**

Given the large number of industry organizations, it's important for COAA to define what distinguishes it from others. These (3) elements of the COAA Value Proposition are important to consider when it comes to chapter leadership and planning:

1. Peer-to-peer education encompassing every aspect of the project delivery process.
2. Events that provide a safe haven for sharing successes and failures, collaboratively with peers and partners, in an intimate setting that allows for meaningful & transparent interaction.
3. People who believe that being a “good Owner” matters – to the industry, to the facilities being created or renewed, and to the people involved – and who understand that part of being a “good Owner” is a sense of humility... knowing what you don't know or need to improve.

## **Strategic Goals**

The following strategic goals were established by the COAA Board of Directors in 2017, then adjusted and verified in 2019. These organizational goals should serve as that “north star” when it comes chapter management and decision-making:

- Grow Membership Vertically & Horizontally

*Vertical growth means expanding Owner sectors already within the COAA fold. For example, as of 2023, roughly 80 higher education institutions or systems were members of COAA. That's great but it's still a fraction of the higher ed sector, and COAA should be able to leverage its strength here to attract other higher ed Owners and grow vertically. Horizontal growth means growing Owner sectors not well-represented in the membership ... particularly those that would seemingly be a great fit, like airports or senior living facilities.*

*Chapters should strive to support both types of growth through direct outreach, social media posts, and leveraging the networks of supporting Associate members.*

- **Empower, Sustain, and Leverage Chapters**

*The idea of this goal is that COAA must do each of these things – empower, sustain, and leverage – to have active, healthy chapters sustainable over time. It's a quid pro quo relationship – chapters don't exist without COAA and COAA likely isn't as successful long term without local/regional outposts in the form of chapters.*

*Several initiatives and tools have been created since 2018 to support this goal, including:*

- *A “Mega-Issue” team of volunteers who explored all aspects of COAA chapters, made recommendations, and formed two follow-up teams to focus specifically on finances and operations/administration*
- *BOD-level “chapter czar” position (currently vacant)*
- *Monthly virtual meetings with chapter leaders*
- *In-person (2019) and virtual (2021) chapter retreats, with a 3<sup>rd</sup> retreat planned for summer 2024*
- *Dedicated staff liaisons for each chapter*
- *Online “toolbox” with documents, examples, marketing tools, etc.*
- *Dedicated Microsoft Teams site*
- *This guidebook*

- **Develop & Expand Learning Opportunities**

*This speaks to the fact that “one size fits all” doesn't apply to adult learning. People learn differently, so COAA must consider this and continuously improve the ways in which content/education is delivered.*

*It is also an acknowledgement that COAA, years ago, relied too heavily on its national conferences and chapter workshops. Those events are typically great, but (a) not everyone is capable or interested in attending the COAA Connect events and (b) many COAA members live & work where no chapter exists.*

*From periodic webinars and the virtual “Brain Food” series for emerging professionals to Owner Training Institute classes, the members-only [eForum](#) and eForum xChange, and the members-only Owners Perspective digital magazine ... more options are now available for both members and non-members.*

*Chapters can help achieve this goal by urging members to use those valuable members-only benefits and by expanding learning opportunities on the local level. In other words, traditional in-person workshops should not be the only thing ever offered by a COAA chapter. Consider virtual gatherings,*

*especially for chapters in large states with long travel distances. Tours of in-progress or recently completed projects are a great, informal way for people to gather, learn, and discuss.*

- **Increase Owner Engagement**

*Having an engaged base is vital for the health and sustainability of COAA. Engaged members are more likely to renew; engaged non-members are more likely to join; and engaged sponsors are more apt to sponsor again. High levels of engagement create an energy and “vibe” that makes the organization even more irresistible and enhances the sense of community that unites the association.*

*All that said, engagement has noticeably decreased the past 3-4 years as people are busier than ever at work and striving for greater work/life balance. Chapters can play an enormous role in reversing that trend and achieving this goal by reminding people of the inherent value of being present, involved, and engaged. Beyond engagement, volunteering at the chapter or national level provides a unique way to expand a person’s network and enhance their professional resume.*

- **Optimize Business Model For a Sustainable Future**

*This goal stems from a realization years ago that COAA relied too heavily on its bi-annual national conferences. For most of COAA’s history, these events produced half or more of the organization’s annual revenue – a formula that works fine if attendance is steady or growing and if nothing catastrophic (like a global pandemic) occurs.*

*A number of things have been implemented to diversify revenue and improve COAA’s business model since 2018, but more work remains. COAA chapters directly support achievement of this goal by:*

- *Being realistic when it comes to annual planning & budgeting*
- *Pursuing annual and/or event sponsors at the chapter level*
- *Showing discretion and sound judgement when it comes to expenses and the use of surplus revenue*
- *Considering lower-cost events and other initiatives*

- **Create & Maintain An Accessible Repository of Owner Resources**

*This goal was partially achieved by creating a “2.0” version of the members-only [eCatalog](#) in 2020. This online library includes template documents, white papers, reports, and other resources of interest to Owners. The idea is a “Wiki-type” platform, where members can both borrow and contribute resources.*

*That said, the eCatalog is underused and not well-known by members, which means that very little new content has been added except occasionally by staff. Moreover, the platform itself is not ideal, as content of this type would be better housed in a dedicated Content Management System (CMS).*

*In 2023, the COAA Board of Directors began discussing (3) strategic initiatives, including the idea that COAA’s 30-year history has created a “body of knowledge” that should be curated, organized, and made available through various means to members and, to some extent, non-members.*

*Chapters can support this goal by seeking and contributing content ... documents and other resources for the eCatalog, volunteer-authored written works, or photos or short videos from events.*

- Implement and Integrate “The COAA Way”  
*Given the definition of The COAA Way in the next section, it’s a tough thing to show or illustrate since it’s both a tangible and intangible concept. How do you take a picture of fairness, culture, or trust?*

*As with other things in life – you’ll know it when you see or experience it! When you do, pause and share it so a collection of The COAA Way examples can be created.*

## **The COAA Way**

Along with the (3) elements of COAA’s Value Proposition, [The COAA Way](#) further distinguishes and separates COAA from other industry organizations.

Understand, first, what The COAA Way is *not*. The word “way” doesn’t imply a methodology or a recipe for success. The COAA Way is more of a mindset and approach, and most members of COAA come to the organization with this mindset already in place ... attracted by the idea of connecting with like-minded organizations.

The COAA Way is a “way” for completing projects successfully, a desire to continuously improve, and a belief that working collaboratively will lead to greater success. It is not based on a specific formula or a certain technology or set of rules since those things change over time. Instead, it leans on the principle that a team of PEOPLE – led by a “Good Owner,” sharing BEST PRACTICES in a CULTURE built on trust & respect – will complete BETTER PROJECTS.

## **COAA Cares**

[COAA Cares](#) (Connecting Attendees with Rewarding Experience & Service) was created in early 2020 on the heels of a wildly successful event during COAA’s fall (2019) conference in Atlanta. Conference attendees constructed wooden rocking chairs for children in support of CHRIS 180, an Atlanta organization that seeks to “provide children, adults, and families with high-quality, trauma-informed behavioral health services and support systems.”

The popularity of this – and the broader sense that COAA and its events ought to incorporate similar “give back” activities – led to the creation of COAA Cares. This initiative seeks to highlight and support charities through a two-pronged approach:

- Providing rewarding, fun, and well-organized opportunities for members and stakeholders to “give back” via tangible, hands-on activities at COAA events
- Supporting and raising awareness of charitable organizations, primarily those within the AEC industry

COAA’s chapters are strongly encouraged to incorporate COAA Cares into in-person events – either with a hands-on activity if time permits or by providing charities with a platform for explaining their mission & purpose.

## **[Governance](#)**

Founded in 1994 by construction law attorney Al Phillips, COAA is a 501c(6) nonprofit corporation headquartered in the Atlanta (GA) suburb of Austell. Organizational leadership is comprised of two main elements:

1. A volunteer [Board of Directors](#) (BOD), comprised of Owner members of the organization who are either elected to 3-year terms by the membership or appointed to 1-year, 2-year, or 3-year terms by the BOD President. One or more Associate members of COAA may be appointed to the BOD by the President as non-voting “Directors at-large.”
2. An Executive Director, who reports to the BOD and leads a small staff responsible for all day-to-day operations of the organization.

COAA, its BOD, and its staff operate under and in compliance with a formal set of [Bylaws](#), which are purposely broad and only occasionally updated or amended ... in part because such modifications must be approved by 2/3 of the voting-eligible membership.

A separate [Bylaws Supplement](#) defines in greater detail composition of the BOD, its officers, and the Executive Committee subset of the BOD. Other organizational guidance or governance is provided through a series of formal policies:

- [Antitrust Policy](#)
- [Privacy Policy](#)
- [Travel & Expense Policy](#)
- [Whistleblower Policy](#)

Committees are the other element of COAA governance. The groups are normally chaired by an Owner; operate under a formal charter (mission statement); and periodically report to the BOD. More information on COAA Committees can be found [HERE](#), and chapters should encourage their members to get involved with one of these or other, less formal COAA work groups.

## **CHAPTER GOVERNANCE**

Governance of COAA's chapter is less formal, with no chapter-level bylaws and (normally) no elections for members of the leadership team. In fact, that term (“leadership team”) is the preferred label for a chapter, as opposed to “Board” since the only Board that exists within COAA is the duly elected or formally-appointed (national) Board of Directors.

### **Leadership Team**

Each chapter is led by a team of volunteer members – both Owners and Associates – who understand and believe in the mission of COAA. While leadership teams should be a healthy mix of Owners and Associates, there should be more Owners than Associates. The exact composition and roles may vary from chapter to chapter, but mandatory and desired leadership roles are as follows:



### **President (mandatory)**

<b>RESPONSIBILITIES</b>	<b>QUALIFICATIONS</b>
Support the strategic goals and current initiatives of COAA	Current Owner member of COAA
Lead the annual chapter planning process	Proven ability to lead, collaborate, communicate, and reach consensus
Recruit volunteers and lead/oversee succession planning	Strong understanding of the organization's mission & vision, strategic goals, value proposition, and current initiatives
Plan and officiate leadership team meetings	
Ensure chapter events are well-planned, financially successful, and responsive to the educational and networking needs of local/regional members	
Participate in virtual monthly COAA chapter leader meetings and periodic in-person or virtual retreats	
Represent the organization at other industry-related gatherings	

### **Vice-President (optional)**

<b>RESPONSIBILITIES</b>	<b>QUALIFICATIONS</b>
Support the strategic goals and current initiatives of COAA	Current Owner member of COAA
Support the chapter President and assume the President's role if he/she is absent or unable to serve	Diligence, reliability, and a proven ability to follow through on action items
Set the example for other volunteers with a positive, collaborative, "can do" approach	Good understanding of the organization's mission & vision, strategic goals, value proposition, and current initiatives
Participate in virtual monthly COAA chapter leader meetings and periodic in-person or virtual retreats	

Each of the following roles can be manned by a single person, but the preferred approach is a small team of 2-4 people, with at least two being Owners. Besides membership in COAA, the primary qualifications for these volunteers are reliability, energy, availability, and a general understanding of the organization's mission.

### **Programming/Events (mandatory)**

Responsible for planning all chapter gatherings, whether education-focused, social, tours, or joint events with other industry organizations. Working closely with the COAA staff liaison, this volunteer or small group will identify content, secure presenters, suggest

venues, and otherwise ensure all aspects of a successful and meaningful event are considered.

### **Sponsorship (mandatory)**

This person or team plays a vital role in the sustainability of the chapter by working with the staff liaison to develop a thoughtful sponsorship plan (including benefits & prices) and then recruiting/engaging potential sponsors.

While COAA is a nonprofit organization, “breaking even” at the chapter level is not sustainable because each chapter must pay an annual assessment to cover overhead and other organizational expenses (see Financial Affairs section). The primary way this is done is through sponsorship – either of the chapter itself (on an annual basis) or of individual events.

### **Recruitment (mandatory)**

This person or small team is charged with developing and executing plans to recruit new-to-COAA attendees and members, most likely in that order, with Owner recruitment being the highest priority. Most people won’t join an organization without first “testing the waters” by attending an event or two and getting a general sense of what the organization is all about. So, while COAA membership is the ultimate goal, a logical first step is to get candidates “in the door.”

This volunteer or team should also consider and address member *retention*. The last thing COAA wants is for someone (or an organization) to join, then not renew their membership. Periodically contacting new or current members is an easy and great way to remind members of the benefits of membership.

### **Communications (optional)**

This volunteer or group is responsible for reviewing marketing materials; monitoring and leveraging the chapter’s social media accounts; and recommending new ways for the chapters to communicate with members and other interested parties.

This team may also be charged with following up with new or prospective attendees/members or generating written or multimedia content during or after chapter events.

### **COAA Cares (optional)**

This volunteer or team is responsible for incorporating charity-supporting activities or “podium time” for charities in chapter-hosted events. See above for more information.

### **Staff Liaison**

Another key component of chapter leadership is the staff liaison, who serves as the primary and only fulltime “doer” for these sorts of tasks and actions:

- All aspects of event planning & execution, including venue/vendor contracts, marketing, sponsorship, and attendee & speaker communication
- Membership-related correspondence and database maintenance
- Organization of periodic/recurring chapter leadership team meetings
- Sponsorship manager

Chapter leaders and the staff liaison should be in regular contact and generally in sync when it comes to goals, plans, events, and other chapter business.

## **Volunteering and Succession Planning**

COAA is a volunteer-based organization that simply cannot exist without a small army of willing, passionate, and engaged members who are willing to fill the sorts of roles outlined above. The organization is mindful, though, that volunteering can devolve into a second (unpaid) job, which ultimately leads to burnout and a lost volunteer.

With that in mind, here are tips and suggestions related to volunteer best practices and succession planning:

- ❖ Tap into people's passion(s)! Volunteers will be most successful and happiest when working on something they truly believe in and enjoy.
- ❖ When recruiting, "sell" the value and joy of volunteering, which benefits both the individual and the organization they belong to via:
  - Professional growth and development of the volunteer, along with a sense of pride and accomplishment
  - Identification of future leaders and grooming of the volunteer to take on more responsibility at the chapter or national level
- ❖ Leverage the power of peer-to-peer relationships. If "Mike" is identified as a potential volunteer but doesn't really know anyone on the leadership team except "Mary," then have "Mary" reach out and make the case.
- ❖ Customize roles and consider alternate titles. Not long ago, most COAA chapters had a Treasurer and Secretary. Those roles have been eliminated in favor of a less formal and more team-oriented approach. Chapters should feel free to continue that trend and create more task-oriented roles with finite terms if that makes the volunteer less wary that they're making a lifetime commitment.
- ❖ Seek guidance from COAA staff, past volunteers, and leaders/volunteers within other chapters. Chances are, someone else has encountered whatever challenge or obstacle is in the way.
- ❖ Thank and publicly recognize volunteers at all levels (not just leaders).
- ❖ Document plans and achievements. Use the chapter's annual plan to record what the group has accomplished and strives to do next. This makes new leaders more confident in their own prospects for success.
- ❖ Volunteers should guard against burnout, keep leaders apprised of work or home demands impeding their volunteer time, and lean on the rest of the "village" as needed.

- ❖ Volunteers shouldn't overstay their welcome. Doing so may create the impression that a leader must serve forever, which can scare away potential successors.
- ❖ Augment instead of replacing. If a fellow member is ready & able to step up and contribute, why wait until the leadership role is vacant? Add them to the team, creating a new role or title if necessary.
- ❖ Succession planning is the process of identifying future leaders and volunteers before the roles they may fill are vacant. As odd as it may seem, volunteers should begin searching for their successor right away since the process normally takes a while.
- ❖ Volunteers should, if possible, stick around during and after a transition. Volunteers are often so relieved (or burned out) that they disappear after stepping aside. A retiring volunteer or leader should offer to be accessible to his/her successor so that the new volunteer/leader has a source of information, history, advice, and encouragement.

## **ANNUAL PLANNING**

Each chapter is required to submit an annual "work plan" for the following year, preferably during Q4 (October-December).

This plan, currently in the form of a multi-tab Excel spreadsheet, allows the leadership team (working with the staff liaison) to outline these elements for the coming year:

- Overall goals
- Leadership team
- Budget
- Events
- Recruitment
- Sponsorship

The *process* of developing this plan is just as important as the final product, as it allows the leadership team to step back ... reflect on successes & challenges (think "plus/delta") ... and consider how to grow and improve in the coming year. It is a time to connect the dots between the organization's mission/vision & goals and specific chapter programs and initiatives.

Ultimately, the chapter President is responsible for submitting the plan to COAA through the staff liaison. That said, the effort should be widespread and collaborative so that each volunteer or team/committee is involved and can take ownership of the end product.

A link to the template work plan document can be found in the Resources section of this guidebook.

## **EVENT PLANNING**

Gatherings – whether in-person or virtual, education-focused or social – are the primary means of sustaining & growing a COAA chapter. They are a chapter's very best recruiting

tool, both for members and sponsors, and are often what makes new or returning attendees decide to come back (or not).

Given all of that, thoughtful and creative event planning is critical for a chapter to thrive and grow. The following list of tips & suggestions is derived from 30 years of organizational experience, trial & error, and member/attendee feedback. Members of the programming/events committee or team should review these periodically and offer ideas for further improving this list.

1. Define event goals. Planning an event can take a lot of time and energy, so a first step should be determining WHY the event is being held and what it's intended to accomplish to help focus resources, time, and energy.
2. Account for the Owner's perspective! From type of event and format to location/venue, content, speakers/presenters, and pricing ... ALWAYS consider what's most appealing valuable to Owner attendees.
3. Choose interesting, relevant content with true "take home" value for attendees, particularly Owners.
4. Employ a variety of workshop formats to appeal to a range of preferences ... lectures and case studies, panels, breakout discussions, interactive exercises, etc.
5. Strive to have at least one Owner in all presentations, case studies, or panel discussions ... but also channel The COAA Way and include other project stakeholders (design professionals, builders, trade contractors, etc.) as appropriate.
6. Settle "big picture" things at least two months in advance of an event (date, location, and program) to allow ample time for marketing and sponsor recruiting. Even if only one of those (3) elements is known – for example, the event date – work with the staff liaison to begin early promotions (e.g., "save the date") and follow up with more specifics once known.
7. Allow time for networking prior to and during the meeting. This is one of the most valuable benefits attendees derive from these gatherings.
8. Discuss financial considerations within the leadership and with the staff liaison to settle variables like registration rates and sponsorship offerings (especially prices and benefits).
9. Once significant event details are known – including date & times, location/venue, pricing, and at least a general programmatic concept – the staff liaison will create the event within COAA's Association Management System and make it "active" (visible online) so people can register.
10. Instead of relying on 1-2 people, consider a "divide & conquer" approach to subsequent tasks, including programming discussions, speaker communication, social media promotions, direct/personal reach-out campaigns, sponsor recruiting & relations, etc. Ensure that doers remain in sync and in touch with other and the staff liaison regarding progress, changes, or constraints/challenges.
11. Promote, Promote, Promote! Encouraging people to attend or sponsor is a "village" activity. COAA's staff liaison and outsourced marketing consultant will create flyers,

eblast promotions, and social media posts, but the entire chapter leadership team should assist, too. That's particularly true when it comes to recruiting Owners, where a more personalized and grass roots approach normally works best. Associates play a huge role, too, since they are connected with far more Owners (clients) than Owners are.

12. When it comes to social media (e.g., LinkedIn) posts), always include something of visual interest. Examples include the official event graphic, the chapter's logo, or a photo from a past event.
13. Several suggestions to consider and implement during the event:
  - a. Be present and in the moment! It's important to enjoy yourself and be truly engaged – this is part of The COAA Way – as opposed to handling “day job” matters or running busily around tending to event logistics.
  - b. Consider having 1-2 volunteers assigned specifically to welcome attendees ... particularly folks new to COAA and especially new-to-COAA Owners. This conveys a warm & welcoming environment that people notice and remember.
  - c. Appoint a volunteer scribe or amateur videographer ... someone who can summarize the event's happenings for sharing on the chapter's web page, in eblasts, and on social media.
14. There are several things to do AFTER the event, too.
  - a. The staff liaison will send a thank you email to attendees with a link to the post-event survey and information regarding continuing education credits. The staff liaison will also create and share a simple financial summary of the event, including expenses, revenues, and net income.
  - b. That should be coupled with more personal and direct correspondence from chapter leaders/volunteers to specific attendees (especially non-member Owners), speakers, and sponsors.
  - c. Using the formal survey results and notes & recollections from leaders & volunteers, the event planning team should debrief the event in “plus/delta” fashion and capture lessons learned to improve future events.

Please also refer to (and USE) the chapter event worksheet/checklist, a link to which can be found in the Resources section of this guidebook.

## **RECRUITMENT**

Recruiting and retaining new members, sponsors, and attendees is the lifeblood of any volunteer organization. Chapters can play a vital role with this by attracting new-to-COAA people and organizations; demonstrating what COAA is all about through meaningful & memorable events; and explaining the benefits of long-term engagement through individual or organizational membership.

There is no “right way” to recruit since each prospective candidate (person or organization) has different reasons for joining, sponsoring, or attending. From professional

development to networking or finding new clients ... the motivations vary, which means the approach must be tailored to the audience.

What follows are ideas and suggestions for recruitment and retention, but also and first consider these two key elements for “selling” COAA:

- ❖ Leverage the things about COAA that make it different, including The COAA Way and the organization’s “generalist” approach to content and education. Owners likely won’t see technical deep dives or facility-specific content at most COAA events, and that’s purposeful. COAA normally leans heavily toward topics that apply regardless of project location, type, size, or cost (contracts, delivery methods, leadership, team-building, technology, etc.). **COAA is more the HOW (process) than the WHAT (is being built).**
  - ❖ Strive to understand the candidate’s perspective to then explain how COAA may be able to help with challenges, process improvement, professional growth, networking, etc.
1. Periodically review the roster of COAA members within the chapter’s state or region, which can be furnished by the staff liaison.
  2. Develop as a “living document” a list of viable prospective members and sponsors, using direct knowledge, research, or “friend of a friend” connections to secure contact information. Share this document with the staff liaison so new contacts can be added to the COAA mailing list or database.
  3. Reach out to those prospects via phone call, email, virtual meeting, or (best of all) in-person contact if possible.
  4. Use chapter events to recruit new members (see above) and don’t be shy about having a member speak about the benefits of membership. Also provide printed membership materials (brochure, “gist cards,” A3) and encourage attendees to visit the Membership page of the COAA website.
  5. Incentivize first-timer and non-member Owners by offering discounted event registration rates to members who bring non-member guests.
  6. Encourage prospective candidates to attend a virtual “COAA Overview” session to learn more about the organization. COAA’s Executive Director and Manager of Membership & Sponsorship conduct this live session monthly for anyone or can schedule a 1-on-1 overview with prospective Owner members.
  7. Retention starts the day someone joins the organization. COAA issues a standard welcome to all new members, but more personal contact from chapter leaders and volunteers goes even further. Reach out ... make the “newbie” feel welcome and included ... and help them build relationships with other members.
  8. Leverage the benefits of COAA membership for both recruitment AND retention since many organizational members may be unaware of those benefits:
    - ❖ Discounted registration fees for:
      - “COAA Connect” national conference
      - Owner Training Institute® courses
      - Chapter workshops & events
    - ❖ AIA-approved learning units / CEUs at most events

- ❖ eForum | eForum xChange
  - ❖ eCatalog document repository
  - ❖ “Brain Food” virtual courses for EPs
  - ❖ *Owners Perspective* digital magazine
  - ❖ Online Member Directory
  - ❖ ConsensusDocs (20% discount; gold standard comments)
9. Use social media, particularly LinkedIn, to talk about COAA and the chapter even when no events are upcoming. Sharing a personal story about how COAA has benefitted a person, an organization, or a project is highly effective.
  10. For organizational Owner members, consider listing COAA membership as a benefit or perk of employment when hiring new talent.
  11. Strive to lower the median age of COAA members by specifically targeting Emerging Professionals (age 35 or younger) and students pursuing AEC degrees.
    - Both groups – EPs and Students – enjoy deeply discounted membership dues and lower registration rates for COAA Connect events.
    - Chapters are encouraged to use surplus monies to underwrite the cost of EPs and students attending both national and chapter events.
    - Both groups may benefit from the recurring (free) “Brain Food” webinars.
    - EP members are eligible to win the annual COAA Emerging Professionals Award for Excellence.
    - Student members – and students at member institutions – are eligible to win the Albert E. Philips Scholarship (up to two awarded each year for \$3,000).

## **SPONSORSHIP**

COAA and its chapters rely heavily on sponsorship by product or service providers to help offset the cost of events and generally sustain the organization.

One key to a successful sponsorship program is thoughtfully balancing the costs and benefits associated with different sponsorship opportunities. The sponsor needs to understand what it will receive as consideration for the money it spends, and obviously higher-priced sponsorships should come with more benefits. By the same token, COAA takes a cautious approach to vendor exposure and generally doesn’t allow sponsors to advertise or present marketing information as part of a COAA event.

One exception to that is “podium time” at chapter events, where a sponsor is granted 1-2 minutes to briefly explain their company and what it does. This is acceptable because it’s a “fenced off” and transparent promotion ... as opposed to marketing disguised as content.

### **Event Sponsorship**

Chapters should strive to secure at least three sponsors for each chapter-hosted event. Prices, benefits, and tier names may vary from chapter to chapter, but here is an example of one approach to sponsorship for a 6-hour workshop that includes lunch:



Level	Quantity	Price	Podium Time (one minute)	10% off national conference registration	Attendee list	Comp workshop registrations	Logo in promotions and event materials
Platinum	3	\$1,000	x	x	x	2	(large)
Gold	5	\$500			x	1	(medium)
Silver	10	\$250					(small)

## Annual Sponsorship

More established chapters may also pursue sustaining annual sponsors for financial support of the chapter itself (not specific events). Prices again may vary from chapter to chapter, but benefits of this type of sponsorship may include:

- Complimentary or discounted membership
- Logo on chapter web page, in all e-blast promotions, and in workshop materials (signage, slide deck, etc.)
- Discounted COAA Connect registration
- Podium time at one or more event(s)

Leaders of the chapter sponsorship effort should benchmark against other industry associations and seek feedback from current and past sponsors to continuously improve sponsorship offerings.

Chapter leaders should also periodically consult with COAA's Manager of Membership & Sponsorship, who can provide guidance and suggestions. He/she may also be able to consult with chapter sponsors who operate nationally and educate them on national sponsorship opportunities and COAA's "annual partner" program.

## MARKETING

Successfully promoting and marketing chapter events and the chapter itself "takes a village" and relies on COAA staff, COAA's outsourced marketing consultant, and chapter volunteers.

Staff and COAA's marketing consultant are responsible for these ways & means of marketing:

- The chapter's web page
- E-blast promotions or newsletters
- Social media promotion of upcoming events or happenings
- Signage and other digital or printed materials used at chapter events

Chapter leaders & volunteers play an equally vital role by:

- Reviewing and providing feedback on marketing materials
- Providing content for newsletters and event recaps

- Posting on social media about the chapter and its events and resharing, and “liking” or commenting on COAA-authored posts

Chapter leaders and volunteers should download, review, and make use of COAA marketing materials & resources. See the Resources section of this guidebook.

## **FINANCIAL AFFAIRS**

### **Overview**

Each year, a chapter will spend money on events and other initiatives (expenses) and will also earn money (revenue) through event registration and sponsorship. While COAA is a nonprofit, the organization strives for its revenue to exceed its expenses, resulting in positive net income. The same is true for chapters, with that positive net income available to cover the cost of these requirements or initiatives:

- The chapter’s annual “affiliate fee” (see below)
- Marketing materials, such as chapter-branded banner stands
- Chapter planning meetings or retreats
- Helping underwrite the cost of Owners attending Owner Training Institute® courses or COAA Connect™ national conferences
- COAA Cares initiatives
- Contributing to COAA’s Al Phillips Scholarship fund
- Give-aways designed to either enhance event experiences (e.g., a book written by a presenter) or recognize superior performance by volunteers

### **COAA’s Financial Structure**

COAA is a singular, incorporated, nonprofit organization that files one (Form 990) tax return each year. Monies are currently housed or invested through these means, with no subdivision or parceling by chapter:

- A Truist checking account used for day-to-day business
- A Truist money market account, where financial reserves earn a modest return in an FDIC-insured platform
- A Wells Fargo savings account, where financial reserves earn a modest return in an FDIC-insured platform
- Three Raymond James investment accounts, where financial reserves earn a more robust return but are more subject to market variations

In addition to the checking account, COAA also has a single official business (Chase Visa) credit card, which is used for both recurring and one-time expenses. The monthly balance is paid in full each month and earned “points” are often used for volunteer gifts or to help pay down the current balance.

COAA uses QuickBooks online, which is integrated with “Novi,” the association management system platform that houses the organization’s database; serves as the “back end” of the COAA website; and is the sole e-commerce platform.

COAA employs a third-party accounting firm for several reasons:

- To perform routine bookkeeping tasks
- To produce and modify monthly and year-end financial statements
- To develop and file the association’s annual tax return

COAA was most recently audited in 2022 for the calendar/fiscal year of 2021. No significant findings or errors were discovered, but the process did reveal the need for additional checks/balances or reviews. For example, including the Treasurer in the reconciliation process of all monthly credit card charges.

## **Chapter Budgeting**

Each chapter should begin budgeting in Q4 for the next year as a coordinated part of the annual planning process outlined above. The quantity, type, and location of events (and their associated expenses & revenues) should obviously be considered, but so too should overall chapter goals and initiatives if those will involve monies in or out.

The annual budget should also account for two variable expenses:

- Travel, lodging, and miscellaneous expenses for onsite staff support of in-person events
- The “affiliate fee” each chapter must pay to help partially underwrite COAA overhead costs (e.g., staff salary & benefits, credit card processing fees, IT platforms, insurance, marketing, and legal fees)

As of 2024, the latter of those is highly variable – both from chapter to chapter and from year to year. COAA staff and a small group of chapter volunteers comprise an informal “chapter finances” work group that reviews prior year financial statements – both for COAA and each chapter – and determines the fee assessed to each chapter. Considerations in the past have included the chapter’s relative financial health, membership in each chapter’s region, the quantity & type of events hosted, and organization-wide impacts (COVID). This fee has ranged in the past from \$3,000 to \$10,000. Chapters should work with their staff liaison to budget an appropriate allowance for this variable fee.

Budgeting best practices:

- The template Annual Work Plan document includes a budget worksheet.
- Revisit past budgets versus actual expenses & income and incorporate lessons learned into future budgets.
- Ensure that overall chapter goals – or at least those involving monies in or out – are accounted for in the budget.

- Also consider known or possible changes in the coming year. For example, fewer/more events, shorter/longer event durations, increased staff support, recruiting investments, etc.
- Apart from numbers, note assumptions in the budget to help explain the rationale or background.
- Seek experienced help from COAA staff and other chapter leaders, and don't be afraid to borrow good ideas from other organizations.

## **LEGAL & TAX CONSIDERATIONS**

COAA is a nonprofit corporation with a single Employer Identification Number (EIN) – specifically, a 501(c)(6) entity as per the Internal Revenue Code. This status affords some freedom but is quite different from a 501(c)(3) charitable organization. For example, COAA is exempt from Federal income tax but not from sales taxes. As another example, contributions to COAA may be considered a business expense but are not tax-deductible as they would be to a 501(c)(3) charity.

In 2009, COAA received a group exemption designation for its subordinate chapters from the IRS. This allows the organization to file a single Form 990 tax return.

Each chapter should also be aware of COAA's Antitrust Policy. The purpose of antitrust laws is to preserve a competitive economy in which free enterprise can flourish. COAA recognizes that free and open discussion of matters of interest to chapter members is important and necessary to the successful operation of COAA. However, chapters should not engage in any joint effort or conspiracy in the restraint of trade and should not discuss issues of pricing, strategy, profit margins, information related to business relationships, terms of business transactions, the division of markets, components of or the process of bidding projects, or similar topics which could be construed as anticompetitive.

## **STARTING, RE-STARTING, and MAINTAINING A CHAPTER**

### **Starting or Re-Starting a Chapter**

COAA has learned over its 30-year history that a critical mass of energetic volunteer members is needed to form or restart a chapter. Too often in the past, a very small group of volunteers helped launch a chapter with little or no supporting cast. Inevitably, when those people moved, changed jobs, or otherwise had life happen to them, the chapter quickly went dark.

So, the first thing required to form or restart a COAA chapter is that critical mass ... at least four Owner members and at least three Associate members in good standing who live and work in the state or region where chapter formation is envisioned. It is preferred that at least two of those (4) Owner members be organizational members since that naturally means more than one person from those organizations may get involved.

*NOTE: The best participants for the chapter start-up or restart effort are not glory hogs or people with personal agendas. Instead, the group must consist of people who can motivate and inspire others, lead by example, keep their commitments, and work collaboratively. In other words, Owners and Associates who operate in The COAA Way.*

Next steps would include:

1. Establishing a recurring virtual meeting of area members – along with COAA staff and select COAA leaders with chapter experience – to begin “planning the plan” for forming or reforming the chapter. In lieu of a single organizational meeting, this would be a medium to long-term continuous dialogue since the timeframe for chapter formation varies greatly.
2. Gathering contact information for other Owners, Associates, and potential stakeholders (e.g., other industry organizations) and developing a campaign for reaching out to those contacts to gauge their interest in chapter formation. COAA can assist with this effort by providing contacts in its database and connecting volunteers with Associate members whose firms have a presence in the state or region in question.
3. Conducting an informal feasibility study to gauge interest in and demand for a COAA chapter. This would involve questions such as:
  - a. Who are the prominent Owners in the state or region?
  - b. How can COAA's strength in certain Owner sectors (e.g., higher ed, healthcare, government) be leveraged to attract those sorts of Owners in the area?
  - c. Similar question for the product and service providers in the state or region.
  - d. How many other AEC industry groups already have a share of the market, and who are they?
4. Planning a first true event – whether virtual or in-person – which should include at least some relevant content (“the draw”) and time devoted to explaining COAA and its history, mission, makeup, etc. Since this first event may be free for attendees and have no sponsors, COAA may be able to underwrite the cost depending on the viability of the proposed or restarted chapter. COAA staff will handle all event planning, registration, financial, marketing, and logistic components and can also assist with outreach.
5. Creating an initial annual plan (including a budget) and supporting documents that illustrate a serious, promising, and sustainable endeavor. This would naturally include a proposed leadership team, comprised of at least a President and chairs/leaders for Programs/Events, Recruitment, and Sponsorship.

Tips and suggestions for explaining and “selling” COAA to prospective event attendees and future members:

- COAA has a variety of tools and informational documents available, but a good first start is to direct people to the COAA website.
- COAA staff presents a live monthly “COAA Overview” that prospects can attend at no cost. Additionally, particularly for Owner prospects, staff can provide this overview in a non-group setting if timing for the recurring meeting doesn't work for the prospect.

- For Owners, emphasize the value proposition of COAA ... relatively low cost of membership and event registration; a national network of peers struggling with similar issues; and a decidedly generalist approach to education (all about the HOW, not so much the WHAT is being built or renovated).
- For Associates, emphasize that COAA exists to make their current or future clients better Owners ... more knowledgeable, empowered, collaborative, fair, timely, and continuously improving.
- For both Owners and Associates, draw attention to things that make COAA unique and special ... a true community of peers; warm/friendly/fun yet serious about process improvement; a one-of-a-kind Owner Training Institute; community outreach possibilities through COAA Cares; and, of course, The COAA Way.
- Strive for a blend of Owner sectors in order to not become known as just an outlet for one particular sector.
- Membership in COAA is not required to attend COAA events but is a pre-requisite for helping organize, restart, or lead a chapter.

If the formation efforts and initial meeting create energy and reveal that long-term success is likely, the chapter would then submit a formal “Letter of Intent to Establish a Chapter” to the COAA Board of Directors.

## **Maintaining A Chapter**

1. Chapters shall adhere to these minimum requirements to maintain their status as an active chapter:
2. Chapters and chapter leaders shall understand and adhere to the COAA bylaws.
3. Chapter leaders must act, communicate, and lead in a manner consistent with the organization's good reputation and its “The COAA Way” collaborative ethos.
4. Chapter leaders shall be active members of COAA in good standing and the President must be an Owner.
5. Chapters must host at least one event each year. Joint events with other industry organizations do not fulfill this requirement.
6. The chapter must complete and submit an annual workplan.
7. Neither the chapter nor its leadership team or other volunteers shall financially bind or obligate COAA. All contracts are between the venue and COAA, and are only to be executed on COAA's behalf by the COAA President, Treasurer, or Executive Director.
8. Chapters shall comply with all Federal, State, and local laws and rules for non-profit organizations.
9. Chapter leaders must be responsive and timely with respect to any inquiries or requests from the COAA Board of Directors, its appointees, or COAA staff.

## **RESOURCES**

The following and other resources can be accessed by chapter volunteers through this members-only page of the COAA website:

### Membership & Recruitment

- What Is An Owner video
- Check Out COAA Video
- COAA Membership Brochure
- COAA A3

### Social Media & Communications

- COAA Social Media Manual
- COAA Social Media Account Links
- Social Media Post Ideas
- COAA Style Guide

### Chapter Toolbox

- Chapter Guidebook
- Annual Work Plan Template
- Event Planning Checklist
- Event Budget Worksheet
- Antitrust Guidelines