



**Construction Owners
Association of America**

Annual Business Meeting

November 3, 2021

www.coaa.org

AGENDA

2021 Recap
Strategic Outlook
Volunteers
2022 and Beyond

2021 Recap

HAPPENINGS & INITIATIVES

- COAA-WI chapter!
- Virtual OTI
- New “Lean For Owners” OTI course
- “Brain Food” virtual series for EPs



- ENR agreement
- COAA overview/pitch presentations
- National Leadership Conference
COAA Connect



- Small But Mighty Projects



- Committees Retired
 - Industry Relations
 - Membership
 - Sponsorship
 - Workforce
- eCatalog



2021 Recap

FISCAL

	2021 Budget	2021 thru 9.30
REVENUE		
Membership	\$225,475	\$175,582
Spring Conference	\$90,000	\$72,026
Fall Conference	\$186,650	\$59,851
Education	\$152,275	\$71,710
Chapters	107,555	\$69,547
Other/Misc.	\$44,950	\$22,721
Total Revenue	\$806,905	\$471,437
EXPENSES		
General Office	\$556,820	\$419,821
Membership	\$6,000	\$3,125
Spring Conference	\$7,000	\$3,450
Fall Conference	\$128,750	\$1,184
Education	\$112,600	\$10,306
BOD	\$13,600	\$0
Chapters	44,143	\$4,188
Other/Misc.	\$15,300	\$6,441
Total Expenses	\$884,213	\$448,515
NET INCOME	(\$77,308)	\$22,921

- COVID impacts – anticipated but worse for OTI than expected
- Membership better than expected 👍
- First-ever budget with chapters included
- Investment of reserves 👍
- Reduced operational costs 👍
- Nearly “caught up” ... finally! 👍

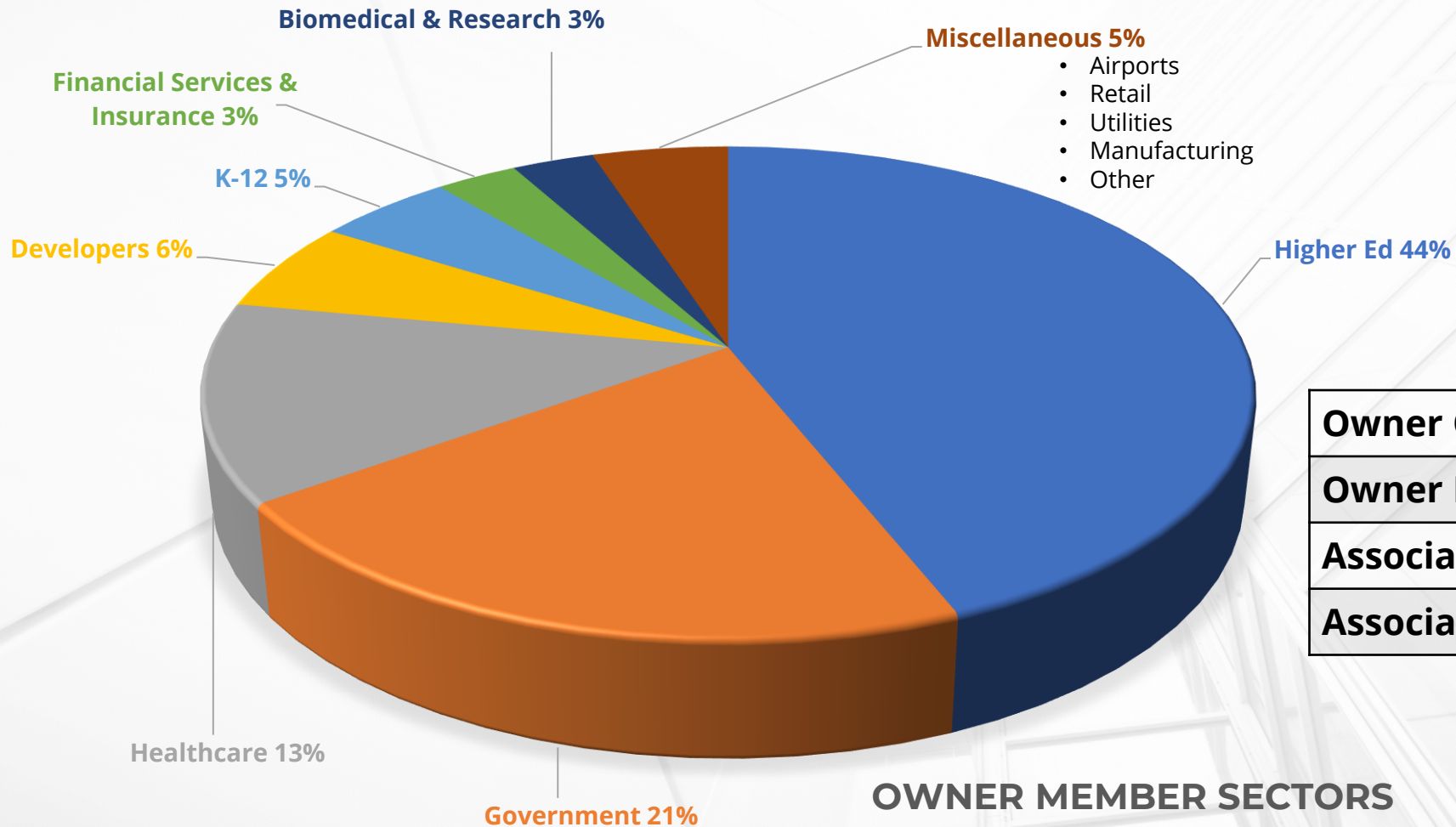
2021 Recap

EVENT ATTENDANCE

EVENT	OWNERS	ASSOCIATES
National Conferences	151	109
Chapter Workshops	284	352
EP Brain Food	80	11
Webinars	66	18
OTI Courses	226	2
eForum xChange	195	103
TOTAL	1,002	595

2021 Recap

MEMBERSHIP



Owner Organizations	154
Owner Heartbeats	2,870
Associate Organizations	155
Associate Heartbeats	195

2021 Recap

MEMBERSHIP

Growth, not Decline!

- Owner organizations – 13% increase since Oct. 2020
- Total “heartbeats” – highest total ever; 19% increase since Oct. 2020



2021 Recap

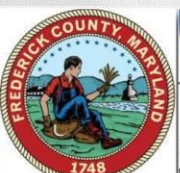
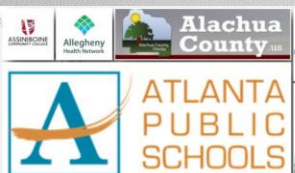
MEMBERSHIP

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Owner Survey:

- 50%++ of PMs in large Owner orgs devoted to “small/minor” projects
- Roughly 1/3 outsource at least some project management
- Slight majority use CMAR for “major” projects; DBB close second
- Strong majority use DBB for “small/minor” projects
- Departmental funding ...
 - ✓ 45% funded entirely by central funds; no fees charged
 - ✓ 37% funded partially by central funds, partially by fees
 - ✓ 17% funded entirely by project management fees



2021 Recap

THANK YOU, PARTNERS!

Platinum



Gold



Bronze



In-Kind



Strategic Outlook

STRATEGIC GOALS



Strategic Outlook

MILESTONES FOR EACH GOAL

Grow membership
vertically and horizontally

1. Recruit at least one Owner organization from these sectors in 2022:
 - a) Airports
 - b) Senior living
 - c) Retail
2. Recruit at least three new healthcare Owner organizations in 2022.

Airports → COAA-FL, COAA-TX
Senior living → COAA-FL, COAA-MD/DC
Retail → COAA-CA, COAA-GA
Healthcare → COAA-IL, COAA-PA

Strategic Outlook

OPERATIONS PLAN

Develop & Expand Learning Opportunities	Excerpt OTI content for webinars. --> PM course for Procore webinar (Aug 2019) --> CMAR for GSA (Aug 2020)	ED	Ongoing
	Help Owners identify topics/challenges that they are passionate about and are expert in; translate this knowledge into best practices or examples for fellow Owners that end up as an article, learning bite, e-Catalog content, etc. Workforce white paper, for example. --> See COAA-GA article examples (spring 21) --> Create a Call (to Owner members) For Articles?	Ed Cmte, ED/Staff and Comms Committee?	2021
	Virtual OTI? Abridged versions of Project Closeout and Design Process Mgmt done; Cost Mgmt conversion in progress; abridged version of Design-Bid-Build is being developed for delivery to GSA-Atlanta in Q4 of 2021	ED, OTI faculty, I.D.	2020/2021
	Develop OP articles on solutions to Owner "pain points." Hire part-time "stringer" to author event summaries and OP articles	Comms Cmte	Ongoing
	Offer new learning bites for members (audio/video or audio-only podcast bursts of 10-15 minutes). The COAA Way and Programming bites (audio only) done Plenty of virtual content likely in the future but staff needs help with video editing ... maybe from Associate members? Also use snippets of bites to enhance SoMe presence	Ed Cmte, ED	In progress

specific initiatives and action items for achieving each of the (7) strategic goals

Strategic Outlook

MEGA-ISSUES

How can COAA improve strategic and financial alignment with its chapters?

Recommendations approved Nov. 2020 by Board

“Spinoff teams” formed to attack:

- Admin & Operations
- Financials

Continue monthly leadership meetings

Periodic retreats

What national leadership conference strategy best supports COAA’s vision & goals?

“Measures of Success” identified for COAA, attendees, presenters, and sponsors

Ideas for variations & improvements identified

- Themed
- Hosted by member org in large city
- One in-person | One virtual
- One national | several regional

Might Beta-test single conference in 2023 or 2024

Strategic Outlook

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Volunteers!



Volunteers!

2022 BOARD OF DIRECTORS

(P) Allison Muth
Medxcel / Ascension Health

**(VP) John Zahor*
University of Maryland Baltimore County

Joseph Sprys
National Heritage Academies

Bill Martin
University of Central Florida

**Shawn Kelly*
General Services Administration

Andrew Reilly
Carnegie Mellon University

Fran Ahern
Wayne State University

(D@L) TBD

** newly re-elected*



Volunteers! CHAPTERS



Virtual retreat

Mega-Issue Spinoff Teams

- Admin/Ops
- Financial

New approach to leadership

~~President
VP
Secretary
Treasurer~~

President
Programs
Recruitment
Sponsorship
Social Media

Volunteers!

COMMITTEES

- Awards
- Conference
- Documents
- Communications
- Education
- Emerging Professionals
- OTI Advisory
- Scholarship



OTHER

- Mega-Issue Teams
- COAA Cares
- Ops Plan Sessions
- Mega-Issue Teams
- SoMe Ambassadors
- Authors
- Testimonials
- xChange Leaders



Volunteers!

Michael E. Kenig Impact & Service Award (*the Kenig*)

Conference Committee
Owner Training Institute®
Workforce Challenge
Chapter Formation(s)
Information Exchange
Industry Partnerships
COAA Evangelist



*to be presented periodically
to COAA's most outstanding
Owner or Associate
member volunteer*



2022 and Beyond

**WE NEED
YOUR HELP**

- ❖ Ops Plan (living document)
- ❖ Strategic Marketing Plan (new)
- ❖ Financial Policies & Procedures
- ❖ Mega-1 chapter processes
- ❖ Re-examine membership structure
- ❖ OTI growth
- ❖ Learning Management System (LMS)
- ❖ Certification or Credentialing?

Chapters and Committees but also ...

- ***COAA Cares***
- ***eCatalog***
- ***Content creators***
- ***Social media***

COAA Connect 2022

 COAA[®]
CONNECT
SPRING 2022

MAY 11-13

**UNIVERSITY OF BALTIMORE
SMC CAMPUS CENTER
Baltimore, Maryland**



FALL CONFERENCE

November 2022
Location TBD



Spring in to
BALTIMORE

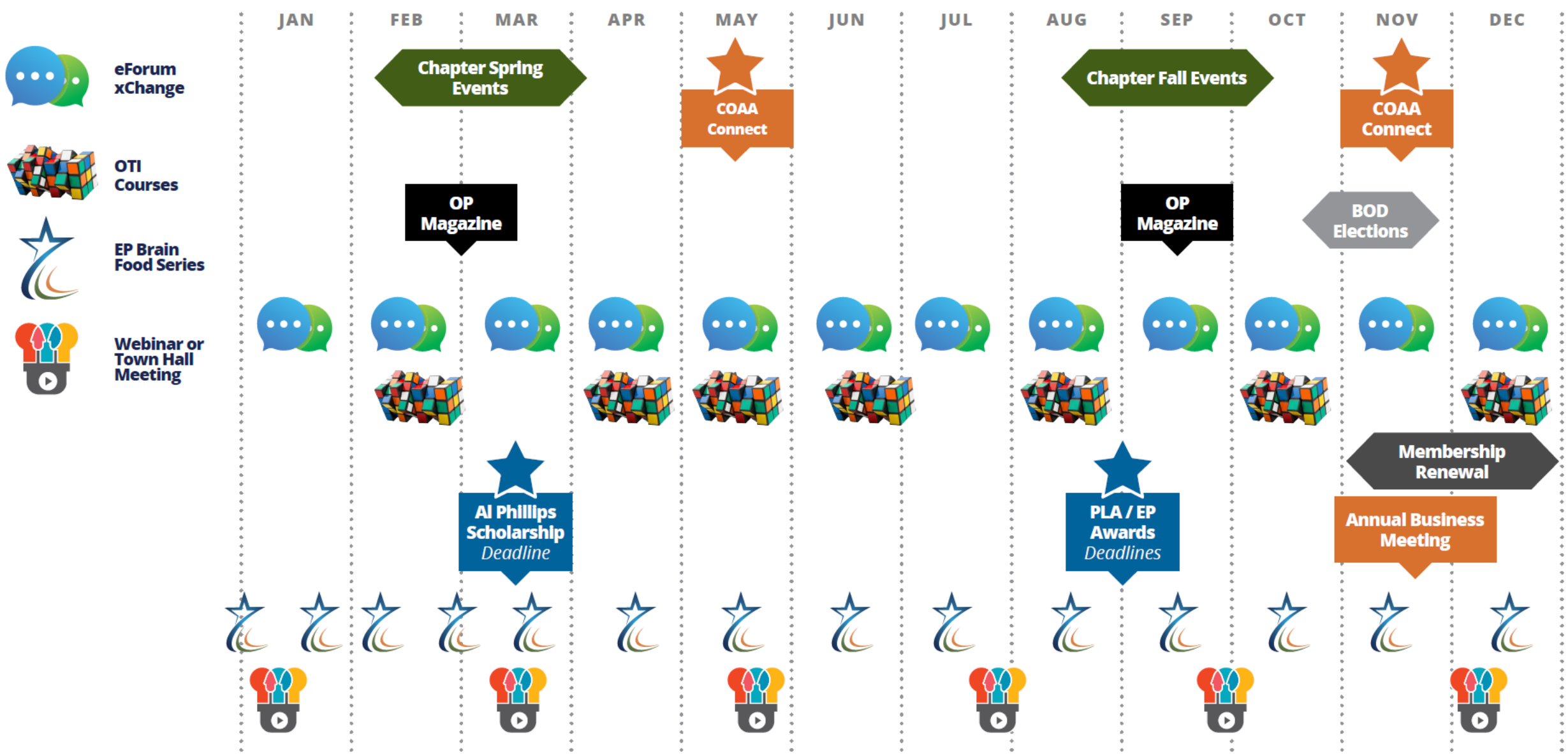
 COAA[®]

OTI ... Back In Person!

- 13 courses created “For Owners, By Owners”
- Presented by O + A/E + C
- Class size limited
- New “Lean For Owners” course developed w/LCI



CMAR	Jan. 10-11	Albuquerque
Intro to Proj Mgmt	Jan. 27-28	Gaithersburg, MD
Project Management	Feb. 9-10	Boston
Lean For Owners	TBD	Baltimore





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