



**Construction *Owners*
Association of America**

Annual Business Meeting

October 27, 2022

www.coaa.org

AGENDA

2022 Recap
Strategic Outlook
Volunteers
2023 and Beyond

2022 Board of Directors

(P) Allison Muth
Medxcel / Ascension Health

(VP) John Zahor
University of Maryland Baltimore County

(T) Andrew Reilly
Carnegie Mellon University

(PP) Joe Sprys
National Heritage Academies (retired)

Bill Martin
University of Central Florida

Fran Ahern
Wayne St. University (retired)

Shawn Kelly
General Services Administration

Directors At-Large
Jessica Bonin
Holder Construction

John Giovannone
The Whiting-Turner Contracting Co.

Legal Counsel
John Sier
Kitch

Carina Kratz
Kitch



COAA Staff



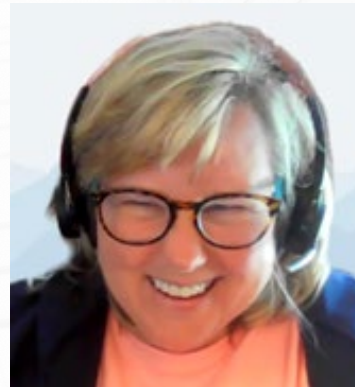
Howie Ferguson
Executive Director



Lucie Castro
Administration & Operations

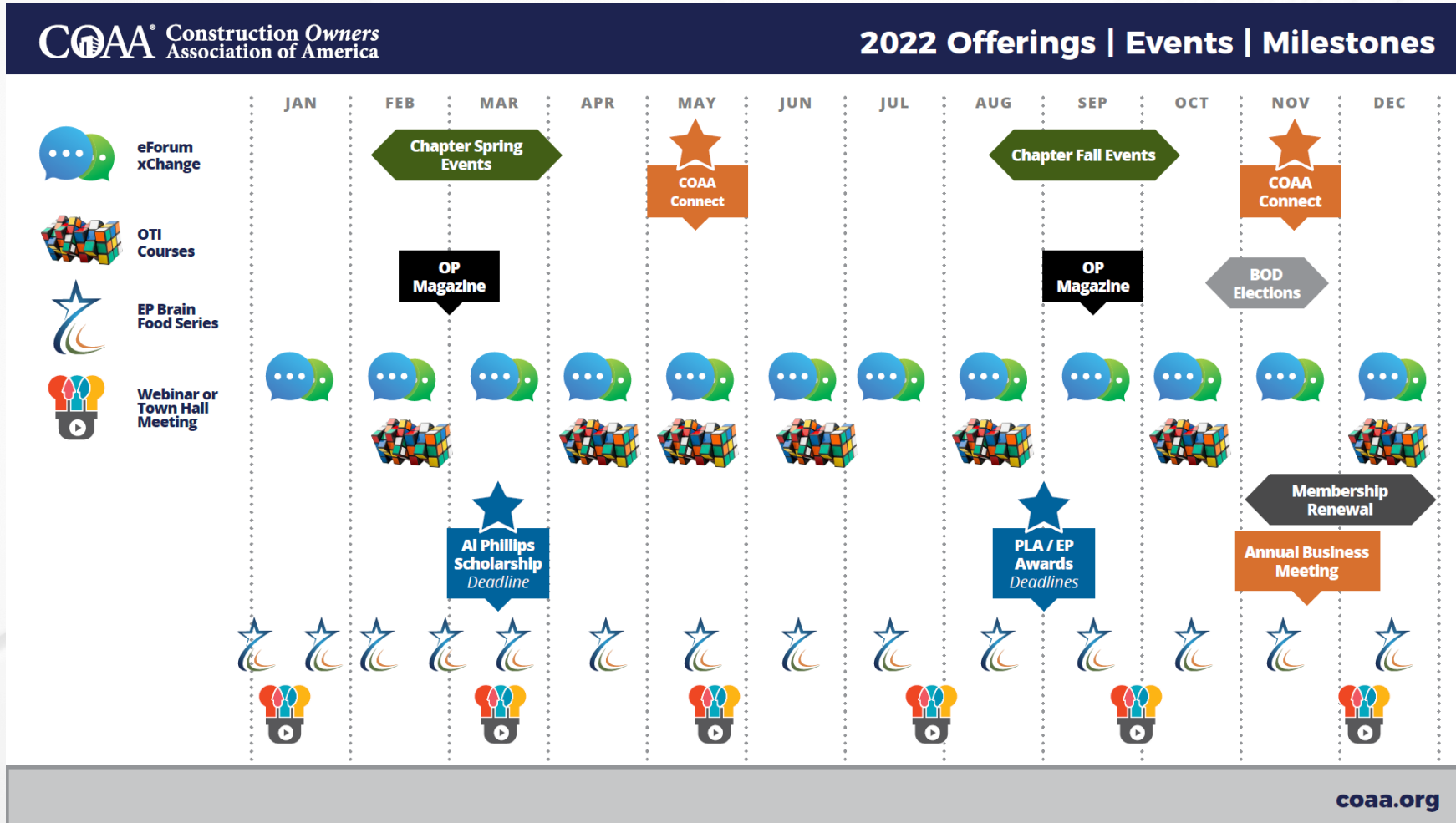


Jenell Calloway
Meetings & Events



Jill McKenzie
Membership & Sponsorship

2022 Recap HAPPENINGS



- Spring conference @ higher ed campus
- In-person OTI courses back in force
 - 2022 - 16 offerings
 - 2021 - 4 offerings
 - 2020 - 2 offerings
- Virtual events FREE FREE FREE
- Welcome, Jenell!

2022 Recap Initiatives

- COAA Cares at chapters
- Brain Food webinars for EPs
- “Value of architecture” discussions w/AIA
- Small But Mighty projects
- PropFuel platform
- Growing the brand ...
 - ✓ ENR partnership
 - ✓ E.D. podcasts
 - ✓ “COAA 101” presentations



2021 Recap

FISCAL

THRU JULY 31, 2022	
Revenue	
Chapters	159,645.59
Education	135,652.50
Fall Conference	19,875.00
Membership	171,645.18
Spring Conference	254,490.00
Other/Misc	9,549.30
Total Revenue	750,857.57
Expenses	
General Office	331,007.16
Membership	3,995.77
Spring Conference	95,130.90
Fall Conference	0.00
Education	66,184.62
Chapters	38,633.94
Board of Directors	0.00
Other/Misc	7,608.17
Total Expenses	542,560.56
Net Income	\$208,297.01

YEAR	NET INCOME
2017	(\$99,916)
2018	\$200,980
2019	\$89,453
2020	(\$85,409)
2021	\$6,248
2022	TBD

- COVID ... we survived! 👍
- Membership better than expected 👍
- Investment of reserves 👍
- Reduction of operational costs 👍
- Books are nearly "caught up" 👍
- Formal 2021 audit starts soon

2022 Recap

EVENT ATTENDANCE

EVENT	QTY	OWNERS	ASSOCIATES
COAA Connect*	2	190	210
Chapter Events	23	353	604
EP Brain Food*	12	166	32
Webinars		68	25
OTI Courses*	16	331	0
eForum xChange*	12	257	94
TOTAL		1,359	959

**estimated thru end of year*

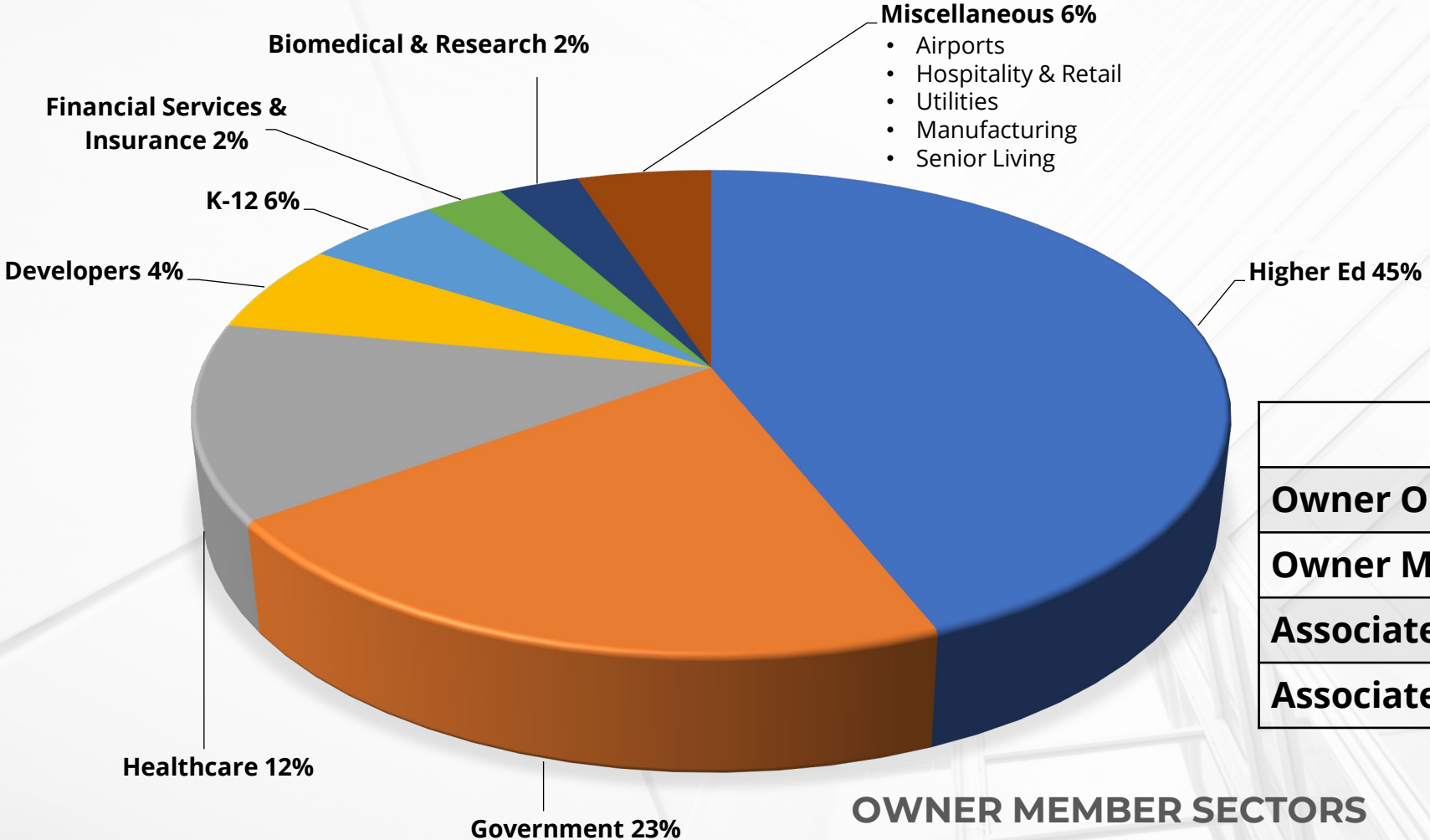
(1,002 in 2021)

(595 in 2021)



2022 Recap

MEMBERSHIP



- Miscellaneous 6%**
- Airports
 - Hospitality & Retail
 - Utilities
 - Manufacturing
 - Senior Living

	2021	2022
Owner Orgs	151	159
Owner Members	2,809	3,241
Associate Orgs	192	154
Associate Members	192	223



2022 Recap

MEMBERSHIP

New Organizational Owner Members

Amegy Bank/Zions Bancorp
Boston University
Bucknell University
California State University System
Clemson University
Cleveland Clinic
College of William & Mary
Florida State University
Hennepin County (MN)
Pennsylvania Dept. of General Services
Princeton University
San Jose State University
Towson University
University of Iowa
U.S. Department of State

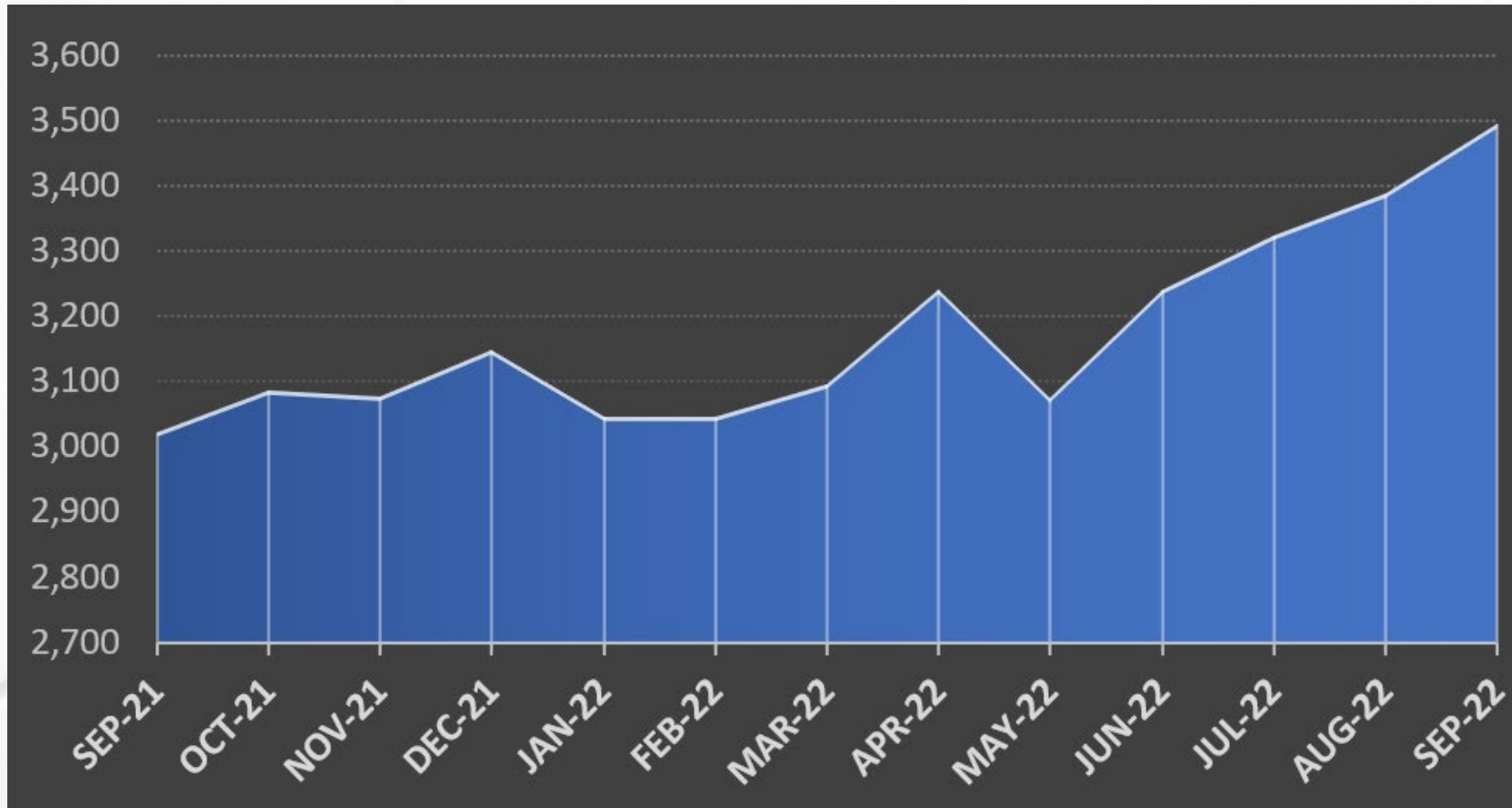
New Individual Owner Members

Amazon
Aurora Public Schools
CSU Bakersfield
City of North Port (FL)
HE Butt Foundation
Maryland Stadium Authority
Medstar Health
Oak Hall School (FL)
Southern Methodist University
Tarrant County (TX)
Washington and Lee University



2022 Recap

MEMBERSHIP



- Owner organizations ... 12% increase since September 2021
- Total “heartbeats” ... highest total ever; 13% increase since September 2021

OWNER MEMBERS OF COAA



2022 Recap

THANK YOU, PARTNERS!

Platinum



Gold



ONINDUS



Bronze



Gold



THE ART & SCIENCE OF BUILDING

In-Kind



Strategic Outlook

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

Greater transparency

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 2024

Volunteers!



Volunteers! CHAPTERS



Continuous improvement!

Mega-Issue Spinoff Teams

- Admin/Ops
- Financial

New approach to leadership



Volunteers!

so many ways to engage ...

COMMITTEES

Conference
Communications
Education
Emerging Pros
OTI Advisory

OTHER

Authors
Awards
COAA Cares
Documents
Mega-Issue Teams

OTHER

OTI Instructors
Scholarship
SoMe Ambassadors
Testimonials
xChange Leaders

2023 and Beyond



- ❖ Ops Plan (living document)
- ❖ Strategic Marketing Plan (new)
- ❖ Financial Policies & Procedures
- ❖ OTI growth
- ❖ Chapter growth?
- ❖ Industry relations

Chapters and Committees but also ...

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

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Elections coming soon!



COAA Connect™ Conferences

COAA Connect Spring 2023

Charlotte, NC
(dates TBD)

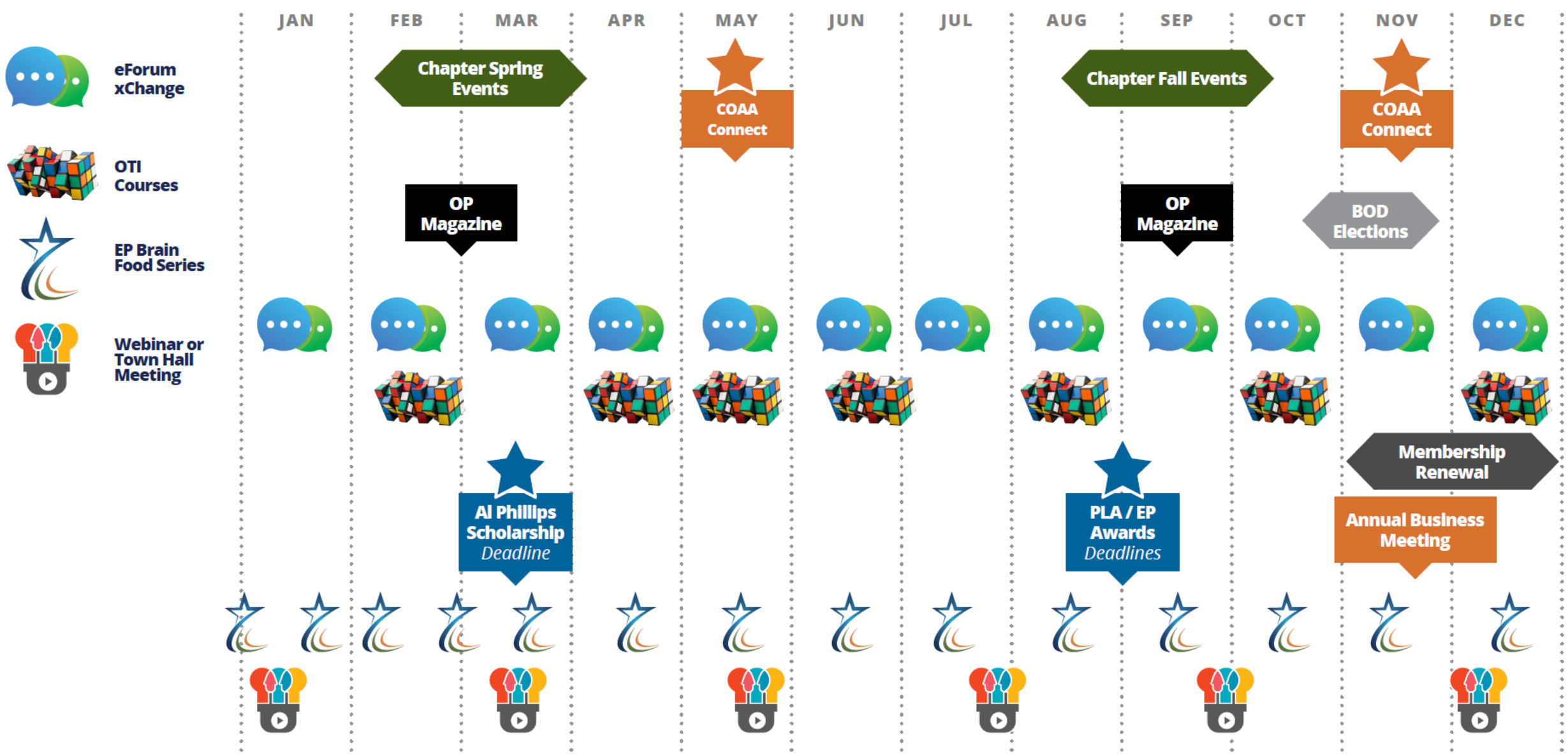
COAA Connect Fall 2023

Orlando, FL
November 13-15

COAA Connect 2024 | 30th Anniversary

(location TBD)
(dates TBD)







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