



SAC

2024 STRATEGIC PLAN



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I. EXECUTIVE SUMMARY

A Strategic Planning Committee and John Gross, the facilitator, began the process of strategic planning use the EOS System through his company Driving Change. The SLC3 had completed the last plan in 2021 which resulted in a new vision and mission statement as well as rebranding. Rebranding has been well received and most are referring to the Council by its new name, the SLC3. Covid has interrupted normal operations from 2020 through 2022. However, half of 2022 did see a bit more normalcy with in-person events. Committees however do not meet in person as they once did, except for Health and Safety which is hybrid.

Financials

Financially the SLC3 is healthier than it has ever been. Overall financials do cover the emergency fund. Membership is the highest it has ever been at 203 members. It's also more inclusive and more diverse than it has been since 1971. On average there was a a net less than 5 new members on a yearly basis. We are netting three times that previous average.

Training and Education (Includes Safety)

Our programs ratings were a 4.2 overall at the end of 2020 when the previous plan was completed. Today the overall is 4.7 as it was in 2022. Owner's overall rating is a 5/5. Although some attendance has decreased the quality of the programming has substantially improved. Programs will continue to include annual programs, tours, technology, best practices and self-development. The Women's Leadership Lunch has not been evaluated but has had a great reception and provided education 11/12 events. Repeating this strategy in 2024 is recommended.

Program registrations average about 50-60. This is at pre-Covid numbers. Competition is causing the reduced numbers attending. This makes our marketing and programming efforts even more vital and more strategic.

○ Overview

○ Financials

○ Training and Ed



- Membership
- Networking
- Sponsorships



I. EXECUTIVE SUMMARY

Membership

The membership has diversified into a larger group of owners, general contractors, subcontractors, unions, associations, engineers, architects, suppliers, and business support companies. We also have a larger variety of large down to one-person owned companies. Membership grew to 213 at the end of 2023. The estimated number 5 years ago was 137 which is about a 56% increase in membership over 5 years. The goal for 2024 is to achieve a 7% net growth or 227 net members. We are also focusing on more retention strategies. Continued strategies for outreach among member organizations to involve more staff in events and volunteering.

Networking

Our networking events have been instrumental in generating additional income. The golf tournament represents a significant portion of the overall revenue and is much beloved by the AEC community. Sponsorships are significant in support of the event. The Clay Shoot is also a favorite and sells out. Sponsorships also are good for the event. The annual Inclusion Workshop did not generate registration income but had one sponsor in 2023. It's meant to be a community service event. The emerging leader events have done moderately well and a committee has been formed. It will need to grow. The Awards Gala does generate revenue from registrations and sponsorships and should be continued but will be revamped for 2025. Registrations though were the highest for the Awards Gala in SLC3 history with over 220 guests vs. 110 in 2019.

Annual/Event Sponsorship

Annual sponsorship revenue was increased in 2023. Revised sponsorships planned for 2024. Additional sponsorships are being planned as well as increases to annual event sponsorships. Overall sponsorship revenue is planned to be increased to keep up with expenses.

○Leadership

○Pillars

○Differentiator



I. EXECUTIVE SUMMARY

Leadership

The Leadership makeup of the SLC3 has turned over since the last plan twice. Kevin Studer (Northstar Mgt.) handed the torch to Mark Winschel (The Opus Group) in 2021 as President. In 2023, Mark (ASC Group/Four Fourteen) handed the torch to Frank Niemerg (Ameren). The Executive Director, Kelly Jackson completed her 5 years as of 9/4/2023. The Executive Committee and Board of Directors is mostly completed with some vacancies.

Pillars

The pillars are the same: Innovation, Continuing Education, Equity Empowerment and Collaboration

Differentiator

Our unique selling proposition depends on the member type. Owner members appreciate the impact of change through its resources and collaboration the SLC3 offers. Associate Members understand the SLC3 is a local user's council or LUC and therefore led by consumers of design and construction (owners). It is called an "owner's" group for that reason. Our uniqueness is our community as it is all-inclusive of AEC stakeholders, quality of training and education, variety of programs/events, resources, and impact as owner-led.

The SLC3 is viable with 4 key financial supports:

- Membership
- Sponsorships
- Fundraisers/Networking
- Programs/T&E & WLG



II. ORGANIZATION UNDERSTANDING

WE ARE:

The SLC3 is a community of design and construction industry professionals with a common interest in the betterment of our region through prioritizing innovation, continuing education, equity empowerment and all-inclusive workforce collaboration. Our community includes owners, engineers, architects, consultants, contractors, managers, legal, financial, insurance, IT, marketing, trades, suppliers, associations, and other service providers.

SLC3 PILLARS

Innovation: Bringing innovative technology and strategies for improving project delivery and safety to better the design and construction industry.

Education: Continuing training and education is the center of the organization as we build stronger leaders, improve knowledge, and demonstrate our unique ability to foster a comprehensive resource for all industry stakeholders. We fulfill continuing education for engineers, architects and safety professionals.

Equity Empowerment: As our focus on diversity, equity, and inclusion deepens, we strive for the empowerment of all our industry. Equity is the goal as inclusion and diversity must be present if equity is present.

Collaboration: When we collaborate with an all-inclusive workforce, we build a better industry and a better region. Through our community we will make a significant impact for years to come.

ORGANIZATION STAFF

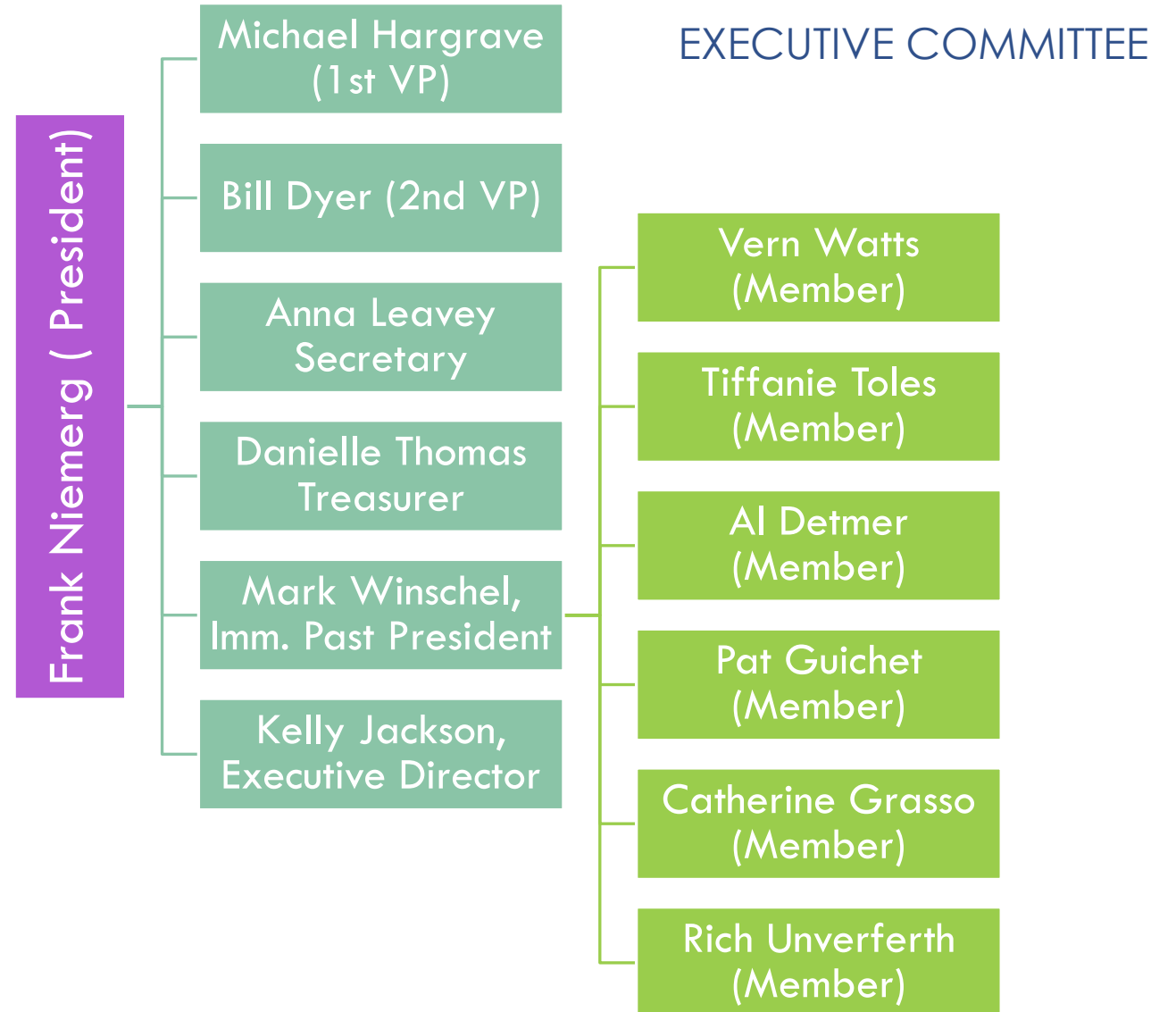
KELLY JACKSON
Executive Director

REBECCA HALE
Office and Event Manager

LYDIA MEYER
Marketing and Membership
Coordinator



II. ORGANIZATION UNDERSTANDING



BOARD OF DIRECTORS



II. ORGANIZATION UNDERSTANDING

Board Members By Company:

1. Bill Dyer (Avison Young/Pace Properties)
2. Francis Niemerg (Ameren)
3. Alan Detmer (Bayer)
4. Michael Hargrave (BJC Healthcare)
5. Steve Arff (Bunge)
6. John Kohler (City of St. Louis)
7. Lauren Talley (Cobalt)
8. Lonny Boring (Great Rivers Greenway)
9. Danielle Thomas (Hazelwood SD)
10. David Kaltwasser (ICL Performance Products)
11. Jerry Beckmann (Lambert Airport)
12. Tiffanie Toles (Kwame Building Group)
13. Mark Hunter (Mallinkrodt)
14. Catherine Grasso (Mercy)
15. Rich Unverferth (MSD)
16. Deniz Piskin (MO Botanical Garden)
17. Drew Raasch (Northstar Mgt.)
18. Pat Guichet (SSM Health)
19. Dr. D'Andre Braddix (St. Louis Community College)
20. Nate Adams (St. Louis County)
21. Neal Richardson (St. Louis Development Corporation)
22. Vern Watts (Washington University)
23. Eugene Morissani (USACE)
24. Mark Winschel – ASC
25. Anna Leavey – Anna Leavey Consulting
26. Kelly Jackson – SLC3 ED

COMMITTEES



II. ORGANIZATION UNDERSTANDING

Committee Chairs & Co-Chairs

Executive (Frank Niemerg, President)

1. Training and Education (Brandon Meinert, USACE)
2. Health & Safety (Chuck Twellman, Ameren) and (Ricky Reams, Murphy)
3. DEI (Nate Adams, St. Louis County) and (Jane Megown, Elastizell)
4. Membership (Mark Winschel, Four Fourteen and ASC)
5. Golf (Tom Estrel, Bunge) and (David Kehm, Christner)
6. Awards (Amanda Bradham Little, Pace Properties) and (Art Buckowitz, IWR (BP))
7. Clay Shoot (Catherine Grasso, Mercy) and Ralph Grant (CRB Builders)
8. Strategic Planning Committee (Kelly Jackson, SLC3)
9. Women's Leadership Committee (Amy Yan, C3 Business Solutions)
10. Emerging Leaders (Sydney Unnerstall, Vessell Architecture)
11. Technology (Brandon Meinert, USACE)
12. Government (Owner Vacancy)
13. Workforce (Through SLCC)

Subcommittees/Affiliations:

SLCC (Owner Members Only)

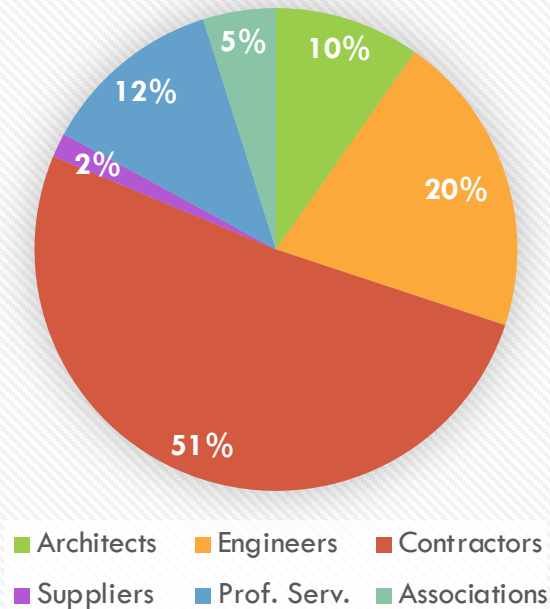
Joint Engineering Collaborative

AGCMO

Site Improvement

COMMITTEES

Associate Breakdown



II. ORGANIZATION UNDERSTANDING

Markets + Professions

The membership structure includes several member types which are defined to the right. The largest population of members are associate members. Owners currently include 24 owner organizations. Membership lists follow.

Members come from a vast variety of industries/services:

Markets:

- Industrial and Manufacturing
- Federal Government
- Local Government/Municipal
- Higher Education
- K-12 Education
- Housing
- Retail
- Corporate/Office
- Recreational
- Transportation
- Hospitality/Hotel
- Telecommunications

Professions:

- Architecture
- Engineering
- Environmental Science
- Geotechnical
- MEP Engineering
- Structural Engineering
- Project Management
- Program Management
- Facility Management
- Real Estate
- Development
- Furniture
- Marketing/Communications
- Insurance and Bonding
- Trades
- Interior Design
- Business Support
- Suppliers

Membership Types:

Council membership is composed of some of the largest construction consumers in the metropolitan area. Because of the size and volume of their construction activities, the Council is recognized as the voice of Owners in the St. Louis region. Owner members as defined earlier hold authority over the organization and are given leadership roles. Associate and Emerging Members support the organization on the various committees.

Note:

It has become more vital for sustainability to appreciate the makeup of associate memberships. Many associate members are members so they can network with other associate members. Understanding who the primary associate members are will increase "secondary" associate members to join. Suppliers seek relationships with designers and contractors. Business support companies do business with most associate members.

II. ORGANIZATION UNDERSTANDING

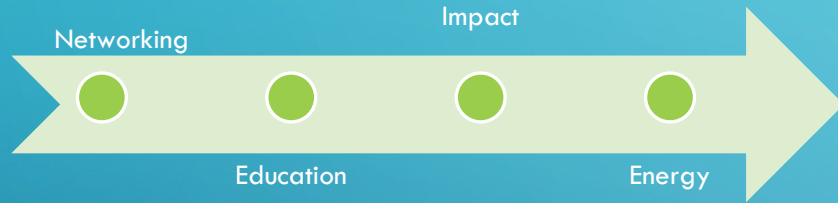
Target Market:

- **Demographic:** Owners, Developers, AEC Industry, Business Support, Suppliers, Trades, Associations, Financial, Legal
- **Geographic:** St. Louis Bi-State Region
- **Psychographic:** People are interested or value relationship building, collaboration, education, DEI, growth mindset, open-minded and willing to listen, see value in participation, peer-to-peer communication, and making a difference/improving the AEC Industry

4 Unique Reasons (why companies and people join SLC3)*:

1. Opportunity to influence AEC Industry
2. High quality networking and event programming
3. Diversity of membership
4. Energy of the organization (opportunities and events)

*Based on survey results



II. ORGANIZATION UNDERSTANDING

Strengths:

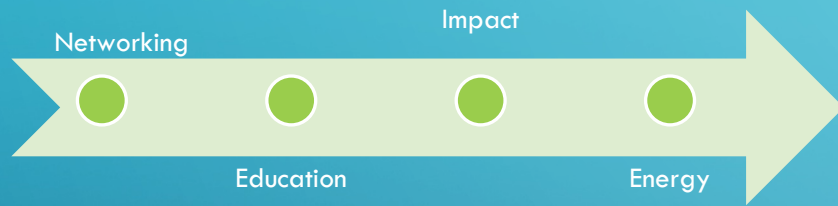
- SLC3 staff
- Marketing/promotions
- Golf tournament
- Education and networking events
- Diversity

Weaknesses and Opportunities:

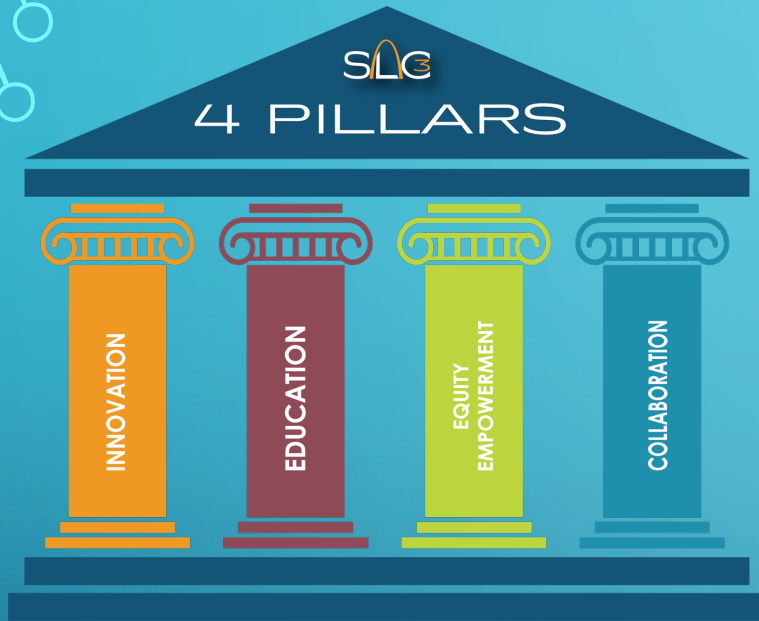
- Staff workload
- Owner participation/leadership
- Sponsorship committee
- Low Sponsorships by Owners
- Increasing young professional and women membership
- CRM system to improve membership tracking and trends

Threats:

- Volunteer participation
- Loss of Engineering Firm memberships
- Loss of owners/SLC3 staff
- Economic downturn/slowdown
- Competition from other industry groups



III. MISSION AND VISION



VISION STATEMENT:

To be the St Louis area's leading community of AEC industry stakeholders, collaborators, educators, and change-makers for the betterment of people, industry, and the region.

MISSION STATEMENT:

Building a better future by uniting the greater St. Louis region's design and construction community in achieving innovation, offering advanced education, equity empowerment, and fostering collaboration among all stakeholders.

GOALS



IV. FINANCIALS

Summary: To be sustainable it is important for the organization to have at least six months in reserve which is approx. \$300K. Budget increase is necessary to increase net revenue over 2023.

Goals for 2024:

- is to obtain a net increase of 15 new members to raise membership dues revenue
- increase overall sponsorships by 5% from 2023 final revenue
- secure venues with lower costs per person
- 5% increase of net revenue over 2023

3-YEAR PICTURE



V. GOALS/OBJECTIVES/STRATEGIES & PLAN

- Net 15 % increase in membership and event attendance
- Address Key Construction Industry Issues with metrics defined to measure impacts on industry
- Increase sponsorships
- Optimized and Sustainable Committees
 - With supporting metrics to make data driven decisions
- Conduct High Quality Programs
- Make Strategy and Leadership decisions supported by data
- Increase diverse membership
- Owner succession planning in place to maintain SLC3 membership continuity
- Build strong Emerging Leader Group with members who recognize how it contributes to career growth
- Establish mechanisms to retain MWDBE members
- Conduct Member survey and benchmarking occurs annually

2024 KEY GOALS



V. GOALS, OBJECTIVES, PLAN

	Key Strategic 2024 SLC3 Goals	Owner
1	Increase Emerging Leader Committee to 10 people by Jan 2024 and 3 planned events by Mar 2024	Cole Loftus
2	Create and issue a membership survey & develop recommendations by end of Q1 2024	Mark Winschel
3	Create a CRM strategy and implement a CRM system by End of Year 2024	Kelly Jackson
4	Evaluate committee structure and reboot committees <ul style="list-style-type: none">- New committees?- Include On-boarding- RACI of roles- Associate leadership?- Collaborating with other St. Louis Construction groups?	Frank Niemerg
5	Create SLC3 owner's succession plans by June 2024	Bill Dyer

OPEN ISSUES



V. GOALS, OBJECTIVES, PLAN

1. Budget Increase
2. More sponsorships, especially owners
3. Creating a Sponsorship Committee
4. More commitment from owners to the organization
5. Partnering with other Construction Groups (such as SLCC, Construction Forum or AGC) for events and shared issues
6. Awards Ceremony – Keep or Change?
7. Having enough volunteers for executing the plans
8. Creating Opportunities to foster equity, Inclusiveness, and Diversity
9. Modify Equity Empowerment pillar description?
10. AEC workforce development focus?
11. Sustainable/Robust Executive Leadership team
12. Attracting College Students

Function:	Objectives	Needs Met?	How?
Collaboration	Understand Owner Concerns Connect with other Owners Open Discussions on Key Issues Create change/improve Increase knowledge	Collaboration with trades, contractors, designers Better Training & Knowledge from Owners Training and new skills	Training & Education Programs Workshops Owner Chats Committees Alliances with organizations
Education and Resources	Better the region Improve communication Information sharing	Achieving Change Best Practices Training Education – Multi focused Go to and trusted resource Business Management DEI Cultural Competency Health and Safety	Training & Education Programs Health and Safety Programs Newsletter Blog Website Social Media
Networking	Network Enhancement Fundraising Relationship Building Training	Building Partnerships Resource Toolbox Improving relationships with peers and providers Increase knowledge on market and opportunities	SLC3 Programs and Events External Programs and Events
Equity Empowerment	Build a more inclusive workforce Increase M/WBE participation on projects Improve business relationships among primes and M/WBEs	Better relationships More workforce Improved projects	Committee Town Halls Inclusion Workshop Participation at external events Blog Social Newsletter
Membership Experience	Create a membership experience that engages the individual to the point they want to attend more events and volunteer to support the organization. Create enough interest where the member representative tells others about their experience.	Unique educational opportunities for learning Outstanding network events Higher level experience Opportunities for building solid relationships Timely news and resources Promotion of People/Businesses/News Resume Building	Offer unique educational opportunities Offer Outstanding network events Always create higher level experience compared to competition Create opportunities for building better relationships Provide Timely news and resources Promotion of People/Businesses/News Build leaders through involvement – committees and programs Improve DEI through Town Halls, Workshops, Committees Focus on key issues/concerns in the industry Word of mouth advertising

PREVIOUS GOALS ONGOING



V. GOALS, OBJECTIVES, PLAN

Continued Focus...

Goal/Objective	Strategies	Date	Responsible
Increase women involved in the SLC3 by 10%	<ul style="list-style-type: none"> • Women's Leadership Committee Events • Invite to serve on committees • Request active members to request participation by women in their offices 	11/24	<ul style="list-style-type: none"> • SLC3 Staff • Membership Committee • Women's Leadership Committee • EC
Increase M/WBE Membership and Retention	DEI Committee Outreach Hosting Town Halls and Workshop Sharing Articles on Newsletter Networking at DEI Events	2024	Executive Director Membership Coordinator DEI Committee/Chair
Generate more content from members for newsletters	Request information from members Advertise for information to be shared Discuss at committee meetings Market at events	2024	Executive Director Membership Coordinator
Increase sponsorships from members	Request <u>owners</u> sponsor annually Add more sponsorship opportunities Combine registrations/sponsorships	2024	Executive Director Event Committees Office Manager
Improve information shared via website	Membership Directory More blogs and resources Consider adding opportunity links	2024	Executive Director Membership Coordinator

VI. EVALUATION/MEASUREMENT

	Key Strategic 2024 SLC3 Goals	Expected Results	Date	Owner
1	Increase Emerging Leader Committee to 10 people by Jan 2024 and 3 planned events by Mar 2024	<ul style="list-style-type: none"> • Committee Meeting Monthly • 10+ Members • Planned and Executed 3 Events 	EOY	Cole Loftus
2	Create and issue a membership survey & develop recommendations by end of Q1 2024	Survey results shared and discussed. Changes identified and changes made.	EOY	Mark Winschel
3	Create a CRM strategy and implement a CRM system by End of Year 2024	<ul style="list-style-type: none"> • CRM strategy prepared • CRM system in place 	EOY	Kelly Jackson
4	Evaluate committee structure and reboot committees <ul style="list-style-type: none"> - New committees? - Include On-boarding - RACI of roles - Associate leadership? - Collaborating with other St Louis Construction groups? 	Committees all evaluated Committees have onboarding plan RACI for each committee completed All committees have an associate Co-Chair Increased collaboration with other associations/groups	EOY	Frank Niemerg
5	Create SLC3 owner's succession plans by June 2024	Each owner has a successor identified	EOY	Bill Dyer