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INTRODUCTION

As the unified voice in Louisiana’s construction industry, representing 500 companies throughout 52 parishes, Pelican Chapter, Associated Builders and Contractors, Inc. (ABC) is a driving political and economic force in the state. Both members and economic and industry partners rely on ABC to synthesize and relay industry trends and threats, as well as set standards for safety and workforce training. Originally established in 1980 to foster the merit shop environment in Louisiana, ABC has continued to broaden its scope of concern over the past three decades, always staying one step ahead of the needs of its members.

The State of Louisiana currently enjoys a top 10 ranking from MeritShopScorecard.org due in large part to our right-to-work status and PLA ban. However, our workforce development and job growth rate threaten to decrease that ranking if resources are not devoted to preventative and ongoing action. While dozens of organizations from economic development groups to educational institutions tout their dedication to finding solutions, ABC is the only organization with the industry expertise to find the right solutions.

ABC knows its success can determine the success of the entire industry and positively impact the state of Louisiana. With the right strategic plan and a committed board, ABC can play an important role in paving the way for a brighter and better future for Louisiana. To help build this roadmap, at the beginning of 2017, ABC engaged Emergent Method, a Louisiana-based management consulting firm, to manage and facilitate its strategic planning process.

MISSION

To promote and protect the Merit Shop Philosophy and the principles of the free enterprise system in the construction industry.

VISION

As the most powerful and influential membership organization in the state, ABC will advance the principles of free enterprise, elevate the construction industry, and positively impact Louisiana in the following areas:

- Governmental affairs
- Workforce recruitment
- Workforce training and development
- Health and safety

VALUE PROPOSITION

The association will achieve its mission and positively impact Louisiana by enhancing the image of the construction industry, elevating the industry’s political influence through one collective voice, and providing craft and safety training, education, and business opportunities for all of our members. We will be positioned so that others seek us out for our opinions on construction-related industry issues and new opportunities.
OVERVIEW

Despite the unique challenges our state and national legislative climate have created, ABC’s Merit Shop Philosophy and commitment to the principles of the free enterprise system in the construction industry have attracted a membership base that represents the best of this industry and has made the Pelican Chapter a model for other trade associations. In the face of adversity, ABC leadership has found creative ways to help members grow and prosper – through government affairs, education and training, and other relevant programming and events. ABC’s prioritization of workforce training given the industry’s workforce shortage is a prime example of this. Hundreds of students have now experienced the association’s innovative curriculum at the Baton Rouge and Southwest Training Centers, preparing young men and women to excel in their craft. This commitment to excellence has won ABC numerous awards and gained the respect of community and political leaders across Louisiana.

It’s clear that ABC’s reputation and accomplishments speak for themselves. This strategic planning process isn’t about starting over. Rather, it is about building upon past successes and examining how recent shifts in the industry and political landscape impact ABC’s mission and its future priorities and operations.

This process sought to answer this question: What does ABC need to do over the next three to five years to advance the Merit Shop Philosophy and make Louisiana’s construction industry the most powerful and prosperous in the nation?

The answers to that question lie in seven priority areas.

The goals and strategies within these seven priority areas are interconnected – the implementation and success of one is necessary for the implementation and success of another. Improving workforce recruitment and development and expanding ABC’s political voice requires an increase in membership and revenue. To grow revenue streams, ABC must build its brand, awareness, and visibility across the state. An improved reputation requires a thoughtful and strategic communications strategy. For this strategy to be effective, ABC must have a clear and compelling mission, vision, and value proposition. Establishing these guiding philosophies and acting on them requires an engaged and committed board of directors.

The codependent relationships described above guided the construction and organization of the goals, focus areas, and strategies that are outlined in the remainder of the plan. The “goals and focus areas” section is organized by each of the seven priority areas and includes goals, a summary of strategies to achieve these goals, and key performance indicators to measure performance. A comprehensive implementation plan with detailed strategies and projected financial investments for each focus area is included as an appendix. The strategies outlined in this implementation plan are organized by year to guide execution. These timing decisions were made in consideration of the codependent relationships described above and available resources.

The execution of these strategies will be driven by staff with assistance from board members through an improved committee structure. The implementation plan is a living document and should be updated at the beginning of each year. Additionally, it is “front-loaded” to allow flexibility to adjust and update in years four and five.
CURRENT PERFORMANCE

Before looking to the future, it is important to understand ABC's current performance in several critical areas of operation.

### Membership

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</thead>
<tbody>
<tr>
<td>Prior Year Members</td>
<td>399</td>
<td>430</td>
<td>430</td>
<td>472</td>
<td>504</td>
<td>536</td>
</tr>
<tr>
<td>Drops</td>
<td>39</td>
<td>61</td>
<td>43</td>
<td>40</td>
<td>60</td>
<td>77</td>
</tr>
<tr>
<td>Retention Count / %</td>
<td>360 (90%)</td>
<td>369 (86%)</td>
<td>387 (90%)</td>
<td>432 (92%)</td>
<td>444 (88%)</td>
<td>459 (86%)</td>
</tr>
<tr>
<td>New Members</td>
<td>70</td>
<td>61</td>
<td>85</td>
<td>72</td>
<td>92</td>
<td>80</td>
</tr>
<tr>
<td>Total Members</td>
<td>430</td>
<td>430</td>
<td>472</td>
<td>504</td>
<td>536</td>
<td>539</td>
</tr>
<tr>
<td>Annual Growth Stage</td>
<td>7.77%</td>
<td>0.00%</td>
<td>9.76%</td>
<td>6.78%</td>
<td>6.35%</td>
<td>0.60%</td>
</tr>
</tbody>
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- ABC has retained at least 86% of its members since 2011
  - Retention has averaged 88.7%
- Membership growth has stayed positive and has averaged 5.21%

### Financial

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<tbody>
<tr>
<td>Cash Position</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>$6,000,000</td>
<td>$5,000,000</td>
<td>$4,500,000</td>
<td>$4,000,000</td>
<td>$3,500,000</td>
<td>$3,000,000</td>
</tr>
<tr>
<td>Reserves</td>
<td>$4,822,414</td>
<td>$3,589,269</td>
<td>$3,000,000</td>
<td>$2,500,000</td>
<td>$2,000,000</td>
<td>$1,500,000</td>
</tr>
</tbody>
</table>
- **Course Choice**
  - Welding, electrical, and millwright: 244 students

- **Non-Returning Student Data**
  - 190 students transferred to the Fall 2017 semester
  - 70 students credited back to the company
  - 35 students refunded

**ABC PAC Support**
- 2017 YTD: $82,337
- 70% of chapter goal
- 2016 total: $118,116

**2016 Free Enterprise Alliance (FEA)**
- Raised $24,172 from Pelican Chapter member dues check-off

**2016 Pelican PAC**
- Raised $34,950 from 157 Pelican Chapter member dues check-off
Longest tenure: 14.6 years
Average tenure: 5.15 years
GOALS AND FOCUS AREAS

Board Recruitment, Governance, and Engagement

ABC’s Board of Directors is responsible for setting the vision for the entire organization. As community leaders with impressive professional track records, their reputations and relationships elevate ABC’s brand and credibility. While staff is responsible for the day-to-day operations, they lean on the guidance, expertise, and perspective of board members.

ABC’s success over the next five years starts with and depends on ABC’s ability to recruit and engage board members while establishing and maintaining effective board governance.

GOALS

- ABC attracts the best possible industry leaders to serve as board members and maximizes their time and talents by keeping them focused on setting the vision for the organization
- Staff members feel empowered to achieve the strategic priorities assigned to their area of operation
- Committee structure and annual planning are improved to support the implementation of the strategic plan
- There are clearly defined performance metrics in each area of operation to assess performance and progress towards completion of strategic plan
- All members understand their potential involvement and leadership journey inside the chapter
- There is a clear secession plan for key board and staff positions
- Successfully navigate the merger with the Bayou Chapter to ensure it benefits the mission and vision of the Pelican Chapter

FOCUS AREAS

- Board Governance
  - Establish staff/board relationship and operating procedures
  - Develop a succession plan for key ABC staff and board positions
- Strategic Planning
  - Establish an annual strategic planning life cycle
  - Develop a “Pelican Chapter Performance Dashboard” to measure organizational success
- Board Recruitment
  - Revise the board nominating committee and process responsible for identifying and recruiting new board members
- Board Engagement
  - Create and implement a new board member orientation process

SUCCESS METRICS – PELICAN CHAPTER SCORECARD

- Board Assessment score
- Strategic initiatives completed
Chapter Operations

The day-to-day operations of ABC drive the overall success of the organization. The chapter’s staff are tasked with implementing this board’s vision and accomplishing strategic goals that help ABC’s mission come to fruition. ABC is a robust and complex organization. Consequently, ABC staff and the resources, technology, and partnerships that support them must be top notch in order for all other areas of operation to excel.

GOALS

- Improve the staff experience and structure to increase productivity, tenure, and affinity
- Build strategic partnerships with like-minded groups to advance ABC’s mission and priorities
- Increase the size of the staff to support strategic priorities and improve current operational shortcomings

FOCUS AREAS

- Staff Structure and Experience
  - Create and implement a “Staff Professional Development Program”
  - Build a robust college internship program that would allow ABC to receive low-cost labor to help with numerous areas of operations
  - Draft a long-term staffing plan that lays out the ideal staff structure
- Operations
  - Develop a “Staff Operations Manual” that includes relevant information for each position
  - Create a list of best practices from other high performing ABC chapters to improve operations and strategic initiatives
- Strategic Partnerships
  - Develop and implement a multi-year partnership plan that leverages relationships with peer organizations and industry groups to advance the mission and initiatives of ABC

SUCCESS METRICS – PELICAN CHAPTER SCORECARD

- Staff tenure
- Number of new strategic partnerships
Governmental Affairs

ABC is the driving force behind the construction industry's political influence in the state. ABC leaders fight constantly to advance the Merit Shop Philosophy and ensure the principles of free enterprise stay intact. Without this voice, member companies will face complex and insurmountable challenges that will negatively impact their bottom line. Relationships with political officials, consistent and thorough research, and robust political fundraising drive success in this area.

ABC's political influence will play a critical role in achieving the long-term vision of the organization.

GOALS

- ABC becomes one of the most influential lobbying organizations in the state through promotion of the Merit Shop Philosophy and the principles of free enterprise
- Improve membership recruitment and engagement and enhance ABC’s reputation through better promotion of governmental affairs accomplishments and priorities
- Expand ABC’s “voice” and cultivate the next generation of governmental affairs advocates
- Expand political fundraising efforts to increase influence locally and nationally
- ABC proactively addresses “macro” industry issues that impact not only member companies but the entire state
- Expand lobbying efforts to reach not only political officials but also important state bureaucrats

FOCUS AREAS

- Member Engagement and Promotion
  - Provide multiple educational and engagement opportunities for members to advance ABC’s political agenda
- Political Official Engagement
  - Use tours of the training centers and job sites to create awareness about ABC’s workforce development progress and regulation challenges
  - Develop a “Legislator Mentorship Program” and become involved in candidate selection to improve relationships
- Industry Advancement
  - Draft position statements on key industry issues
  - Identify and prioritize “macro issues” in the industry that ABC can positively impact

SUCCESS METRICS – PELICAN CHAPTER SCORECARD

- PAC fundraising dollars
- Number of new relationships with political officials
- Number of bills impacted through lobbying efforts
Workforce Recruitment and Development

A skilled and trained workforce is the backbone of the construction industry and dictates the long-term growth potential of all construction companies. ABC’s training centers provide world-class education that attracts and prepares the future workforce for the construction industry. Under the Industrial Contractors Council’s leadership, ABC has navigated industry advancements and new regulations that have created unique challenges for its members and has established a financial model that has allowed the training centers to flourish. In return, ABC has provided member companies with access to skilled candidates that have helped these companies reach new heights and advance their bottom line. But training this workforce is only half the battle. To fully fulfill its mission, ABC must attract a new generation of workers to the industry by showcasing benefits and long-term career growth opportunities. Strategic partnerships with peer organizations and the education system offer new and exciting opportunities to advance this strategic area.

GOALS

- ABC forms strategic partnerships that allows it to become the “graduate school” for training with high schools and junior colleges offering introductory training
- Fully assess the accreditation process through a task force and develop a plan to implement the best path forward
- Advance workforce development and recruitment through improved outreach and marketing to high school administration, parents, and students
- Improve and expand training facilities, staff, and curriculum
- Increase training offerings tailored to commercial industry

FOCUS AREAS

- Training Center Operations
  - Build a blueprint for future training center operations and staffing based on industry research
  - Increase quantity and quality of trainings offered to both commercial and industrial members
- Workforce Recruitment
  - Develop and implement a multi-year outreach strategy to build relationships and establish partnerships with high schools and community colleges
  - Launch a workforce recruitment marketing campaign

SUCCESS METRICS – PELICAN CHAPTER SCORECARD

- Number of new high school and community college partnerships
- Training center graduation rates
- Training center retention rates
- Number of new trainings and classes offered
ABC’s membership base drives the fiscal health, reach, visibility, political influence, and reputation of the organization. Members pay dues, serve on committees, provide resources, attract new members, and serve as ambassadors for the organization. While quantity is important, the quality of the membership base is the driving force behind ABC’s ability to fulfill its mission and achieve its vision. ABC has done a phenomenal job recruiting industrial contractors. However, there are numerous of commercial contractors that don’t yet see the value in joining.

**GOALS**
- Codify and improve ABC’s membership recruitment approach and increase membership participation in the recruitment process
- Strengthen membership affinity by recruiting members based on the Merit Shop Philosophy and ABC’s values
- Expand each membership class with a focus on quality contractors over suppliers, vendors, and industry partners
- Extend ABC’s geographic reach and increase representation in mid and north Louisiana

**FOCUS AREAS**
- **Planning**
  - Develop a standardized membership recruitment process and supporting resources to be used to guide all recruitment efforts
- **Recruitment Operations**
  - Establish a multi-year membership growth plan to achieve membership growth goals
  - Improve staffing model, committee operations, and incentive programs to advance recruitment efforts

**SUCCESS METRICS – PELICAN CHAPTER SCORECARD**
- Total membership
- Number of new members recruited
- Percent increase in commercial membership base
Membership Experience

Membership retention is directly correlated to membership satisfaction. This satisfaction is driven by the experience ABC offers. The diversity of ABC’s membership base presents challenges making it difficult to meet the needs of each member. To address these challenges, ABC provides numerous opportunities for members to get involved in chapter operations, expand their professional network, and gain new skills and best practices through education and craft training. However, long-term affinity is cultivated through rallying all members around the need and importance of promoting the Merit Shop Philosophy.

GOALS

• Improve membership retention, participation, and satisfaction by providing meaningful engagement opportunities
• Increased engagement and participation from commercial contractors
• Improved and ongoing assessment and evaluation of membership satisfaction and engagement

FOCUS AREAS

• Planning
  - Conduct a membership engagement assessment and develop an annual membership engagement plan
  - Launch a Builders Council focused on the needs of commercial members

• Orientation and Retention
  - Codify new member orientation process to ensure proper transition into the organization
  - Track participation and create a “triage team” to proactively address member apathy and attrition

• Programs, Events, and Initiatives
  - Develop a standardized post-event follow-up strategy
  - Provide meaningful educational and networking opportunities for all members
  - Create a “business incubator program” to provide mentoring and resources to members with growing businesses

SUCCESS METRICS – PELICAN CHAPTER SCORECARD

• Retention rate
• Membership satisfaction scores
• Number of educational and networking events provided
Marketing and Communications

Technology has transformed the way organizations communicate with their constituents. Every day people are inundated with new information through email, social media, and smartphone communications. These advancements have shortened people’s attention span and made it more difficult to catch someone’s eye. Consequently, companies and organizations have reevaluated their brands and multiplied the size of their marketing and communication teams and strategies in order to appeal to their target markets.

Now, more than ever, organizations are having to expand their marketing and communication efforts to achieve their goals and reach key stakeholders inside and outside of respective organizations.

GOALS

- Improve marketing and communication efforts and infrastructure to ensure ABC remains relevant and effectively reaches its target audiences
- Enhance the reputation and credibility of ABC throughout strategic outreach to the general public and other external stakeholders

FOCUS AREAS

- Planning
  - Conduct a marketing and communication assessment and develop an annual communication plan
  - Establish branding guidelines to ensure the consistency and integrity of ABC’s brand
  - Improve ABC’s social media presence through engaging and informative content

- Marketing Materials and Outreach
  - Create a video series highlighting ABC’s history, mission, accomplishments, workforce development, and other strategic initiatives
  - Explore new technology platforms to increase member engagement and advance ABC’s brand
  - Launch a marketing campaign that promotes ABC and its mission to the general public and other external stakeholders

SUCCESS METRICS – PELICAN CHAPTER SCORECARD

- Number of social media followers (% increase year-over-year)
- Email open rate (% increase year-over-year)
- Number of website views (% increase year-over-year)
- Number of marketing materials
- Number of positive media stories
MEASURING SUCCESS

High-performing organizations must evaluate the impact of their efforts to fully understand how successful they were at achieving their vision and goals. ABC should evaluate its success on three levels.

First, ABC should create a “Pelican Chapter Scorecard,” broken out by each section of the strategic plan, to track progress towards strategic initiatives and key performances indicators. At the strategic planning retreat at the beginning of each year, each committee should review and tweak these success metrics based on the priorities for that upcoming year. These metrics should be evaluated by the staff and reported to the board of directors semi-annually.

Second, ABC should consistently collect feedback from its key stakeholder groups. Surveys should be used annually to solicit opinions from these individuals. These stakeholder groups include, but are not limited to: members, political officials, training center students, and industry partners. ABC should use this feedback to improve its approach to servicing these stakeholder groups.

Third, ABC should regularly assess the performance and engagement of its staff and board. Annually, board members should complete the “Board Assessment” – template included in the appendix. Additionally, senior staff should set benchmarks for each staff member at the beginning of each year. These benchmarks should include relevant information for the Pelican Chapter Scorecard.
FINANCIAL INVESTMENT

To better understand the financial investment it might take to achieve the strategies outlined in the implementation plan in the appendix, a year-by-year expense breakdown was developed. Re-occurring expenses (ex. new staff positions) are represented in the first year they occur and each year afterwards to accurately represent the aggregate cost over the next five years.

These expenses include:

2018 | $120,600 - $161,300
- Additional staff/interns, staff professional development, membership benefits*, revamped recruitment materials, events and programs, an ABC video series, branded apparel for staff

2019 | $230,100 - $315,600
- Additional staff/interns, staff professional development, finance/accounting staff support, IT support, membership benefits*, revamped recruitment program, events and programs, new website

2020 | $290,100 - $402,600
- Additional staff/interns, staff professional development, finance/accounting staff support, IT support, part-time lobbyist, training center upgrades*, alumni association, workforce recruitment marketing, membership benefits*, revamped recruitment materials, events and programs

2021 | $290,100 - $402,600
- Additional staff/interns, staff professional development, finance/accounting staff support, IT support, events with political officials, part-time lobbyist, training center upgrades*, alumni association, membership benefits*, membership recruitment materials, events and programs, marketing campaign

2022 | $295,100 - $407,600
- Additional staff/interns, staff professional development, finance/accounting staff support, IT support, events with political officials, part-time lobbyist, training center upgrades*, alumni association, industry aptitude test, membership benefits, recruitment materials, events and programs, mobile app

These numbers are not exact – they are ballpark estimates. Additionally, some of these expenses could be covered with in-kind donations. ABC should leverage the expertise, networks, and generosity of its board members and members to offset as many of these expenses as possible. Furthermore, some initiatives, such as additional membership benefits or additional staff focused on membership recruitment, could result in increased revenue. However, these potential increases are not represented here to ensure conservative planning.

Some initiatives are listed in the analysis but not accounted for in total expenses because they are too hard to predict – these initiatives are represented with an "***". For example, this plan recommends an assessment be conducted during 2019 to identify training center improvement. ABC leadership should evaluate these expenses ahead of the budgeting period to ensure these expenses are accounted for.

A detailed financial breakdown is included in the appendix.