

2016-2017 Region Business Plan and Budget

# **SOUTHWEST REGION**

Texas, Arkansas, New Mexico, Oklahoma, Louisiana

15 December 2016



SW Region DBIA  
PO Box 4646  
Austin, Texas 78765



## SECTION 1: Business Plan DBIA Southwest Region

### Summary of Region Activities

#### Membership:

Current membership for the SW Region as of October 2016 is 132 individual members and 173 industry partners.

#### Events/Sponsorship:

The region successfully hosted 4 chapter events including an event in Dallas with a record attendance of 122 individuals attended. We held our 12<sup>th</sup> annual Region Conference in Little Rock Arkansas of this year with 52 in attendance.

The Region received \$20,250 in sponsorships for 2016 and currently has received monetary support totaling \$7,500 for 2017.

First Name	Last Name	Company	Amount Paid	City	State
<b>PLATINUM</b>					
David	Bates	<b>TDIndustries</b>	\$ 4,500.00	Dallas	TX
<b>GOLD</b>					
Chris	Lindhardt	<b>The Beck Group</b>	\$ 3,000.00	Dallas	TX
Randy	Landers	<b>Speed-Fab Crete</b>	\$ 3,000.00	Fort Worth	TX
Rodney	D'Spain	<b>Burns &amp; McDonnell</b>	\$ 3,000.00	Fort Worth	TX
<b>SILVER</b>					
Stephen	Clouten	<b>Nabholz Construction</b>	\$ 1,500.00	Conway	AR
Hugh	Sanford	<b>Flintco, LLC</b>	\$ 1,500.00	Springdale	AR
Raymond	Messer	<b>Walter P Moore</b>	\$ 1,500.00	Houston	TX
<b>RECEPTION</b>					
Chris	Butler	<b>Jaynes Corporation</b>	\$ 750.00	Albuquerque	NM
Michael	Stubbs	<b>Stubbs Engineering</b>	\$ 750.00	Las Cruces	NM
David	Hazenhall	<b>Hasen Construction</b>	\$ 750.00	Fort Worth	TX

#### Education:

The region hosted the following Educational Courses:

Course Offered	Dates	Attendance
DBIA Certification Workshop	February	13
DBIA Certification Workshop	June 6th, 7th and 8th	16
BIM Execution Planning (BIM) Course	July 8th	8
Design Management Fundamentals Course	July 12th	9
<b>Total</b>		<b>46</b>

#### Advocacy:

We have an active legal committee that keeps abreast of laws impacting DB in each of our region States.




#### Other:

Our region had four Universities participate in the National student competition four a total of six teams. The national winner of 2015, The University of New Mexico, has now begun the paperwork to become an official student chapter which is a tremendous success for the region. Volunteerism remains strong – we had 15 respondents to our request for planning committee volunteers and 12 respondents to our region student competition judging panel.









### Feedback on Region

#### Challenges

- The region continues to face budgetary challenges despite improving economic outlooks. Primarily, we lack support from major industry partners despite a targeted campaign to those firms. Sixty percent (60%) of our membership is comprised of individuals from DBIA Industry Partners. Sadly, the clear majority of these members are inactive at the SW Regional level.
- Lack of resources/commitment for soliciting speakers, topics and scheduling local chapter events (lunch and learns, etc.). We need to improve our local chapter participation, specifically San Antonio, Austin, Oklahoma City, Tulsa which in the past have been very successful both in number of events and profitability. This is another challenge where increased Industry Partners participation could have a big impact.

-  Increased attendance for our annual conferences is needed to offset the tremendous effort required to host this event. This is yet another issue where increased Industry Partners participation could have a significant impact.
-  The need to increase membership and involvement by members, need to generate additional revenue so the Region can provide additional benefits to its membership and students. Once again, increased Industry Partners participation would be very beneficial.
-  The state of DB legislation in most of our states could greatly be improved (e.g. Arkansas, Oklahoma, Louisiana) which could be a catalyst for the Region for increased interest and membership.

### Successes

-  The SW Region is functioning as intended and generating revenue to cover expenses, albeit with minimal funds available to foster improved services and programs for our membership.
-  University participation is increasing with renewed interest by two large universities and participation in the National DBIA Student Competition.
-  The region has become more active in Arkansas.
-  Continue to host regional conferences for membership. This year we had 52 attendees.
-  Realizing increases in volunteerism, particularly from new members.
-  Hosted a successful annual conference which generated revenue and boasted a great program.
-  The Region received Gold sponsorships from three new sources this year; Walter P. Moore, Flintco, and Nabholz Construction.
-  Increased participation from region students and faculty.




### Request for Support

1. The SW Region also believes that a near term goal is for the Region to be self-sufficient and operate from a strong financial base. The Region would like to request that DBIA National work in a collaborative manner this coming year and use the SW Region as a model for regional self-sufficiency. We believe a key to achieving this goal, is energizing the Industry Partners to: Financially support the Region (e.g. annual sponsorships)
2. Take steps increase its employees' presence and participation in the Region by:
  - a. Becoming active members in the various Chapters to plan, promote and attend events.
  - b. "Work their network" to encourage attendance at Chapter and Regional Annual Conference.
  - c. "Work their "network" to encourage membership at Regional or National level as well as financially support the Region.

These steps as well as others that we can jointly develop and implement could greatly benefit both the Region and National in its efforts to achieve our common goal.

### Outline of Planned Activities and Goals 2017

The SW Region Board has reviewed and supports the National strategic plan for 2016-2018. We respectfully submit our planned activities and goals for the coming year that foster support for the strategic plan as well as Region and Chapter growth including education courses, annual meetings, membership networking events, and support for architectural, engineering and construction students within our region.

-  Revitalize chapter participation and establish new chapter(s) within the Region (Grow Membership)
-  Promote design-build done right as a viable delivery system to potential project owners (Owner Outreach)
-  Focus on the inclusion of student participation in Region activities (Student Outreach)



### **Member Outreach Goal – Revitalize Chapter Participation and Establish New Chapter(s)**

To facilitate promotion of the Design Build ideology and improve our region’s overall membership and participation, a goal for 2016 and beyond will be to re-establish our chapters in San Antonio, Austin, Houston and Tulsa with an emphasis on membership growth and promoting DB Done Right. The board and membership committees will work to identify and appoint new champions in these regions and assist them in sponsoring local seminars, meetings, and other events to reach new members and support our existing members; then provide continued support to remain successful in these areas. In addition, renewed efforts to engage those areas within our region that have been less active, which includes Arkansas and Louisiana, will be another focus area for our board and both the education and membership committees. Initial efforts will focus on identifying existing members in these regions and seeking their assistance in identifying opportunities to promote Design Build to them, their companies and clients. The region will make every effort to direct marketing efforts, attract owner involvement, and establish methodologies to engage and attract greater participation in these States. Efforts of the new “outreach” goal will include both Arkansas and Louisiana as opportunities to grow our regional membership and success.

### **Owner Outreach Goal**

DBIA-Southwest will market our organization and our members as experts in design-build delivery to promote design-build as a viable delivery system to potential project owners. It shall be the goal of our members to make presentations at as many facility owner conventions and networking sessions on the technical aspects of Design-Build, the benefits of Design-Build, and best practices of Design-Build. This year, we will need to identify opportunities to partner with various owner organizations such as municipal, county and state government organizations, state transportation departments and private owners. By developing these relationships, we will be able to market Design-Build as viable and advantageous project delivery system.

### **Student Outreach Goal**

Promoting Design Build is a prime objective of the DBIA and a symbol of our success in this endeavor has been an increased interest at the University level within our region. To continue and expand this effort our goal will be to focus on the inclusion of student participation in Region activities, education opportunities, membership on committee’s and attendance at our regional conference, and assistance allowing interested students to attend the DBIA National Conference. Enhanced participation should foster an increased awareness and appreciation of Design Build and open the door for their continued interest beyond graduation including personal membership in the organization upon leaving college. We will support our current student chapters and seek to engage students in the appropriate fields of study throughout our region. Quantifiable results would be increased student membership in Region activities and additional student chapter participation at the university level. Additionally, assist universities in establishing DBIA curriculum with support from National.



## Current Listing of Region Board Members: 2016-2017

### **Chair**

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### **Vice-Chair**

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<p><b>Raimund McClain, AIA, LEED AP</b>            McClain+Yu Architecture &amp; Design            2009 Ridgecrest Drive SE, Ste. A            Albuquerque, NM 87108            (505) 266-2142            raimund@mcclain-yu.com</p>	<p><b>Chris Lindhart</b>            The Beck Group            1807 Ross Avenue, Suite 500            Dallas, TX 75201-8006            (214) 303-6205            chrislindhart@beckgroup.com</p>
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## SECTION 2: Budget

### Board Approved Budget for 2017

The board approved this budget at our meeting in Las Vegas, NV.

The budget presented provides for the revenue projections to meet the expenses contemplated for the Region to implement its strategies to meet its basic goals for 2017. The budget does not include funding of the programs and membership benefits that the Region Board desires to provide, including, but not limited too;

-  Expanding the Annual Regional Conference
-  Providing funds for increased student participation including providing travel funds to students who wish to attend both our regional and national conferences.
-  Providing funds to provide speakers and programs to our student chapters.
-  Provide funding to Owners who desire to enroll in DBIA courses, attend the regional conference and to bolster owner attendance at the National DBIA Conference.

### Revenues

Dues	\$16,400.00
Houston Chapter Registrations/Sponsorships	0.00
San Antonio Chapter Registrations/Sponsorships	0.00
DFW Chapter Registrations/Sponsorships	4,000.00
Austin Chapter Registrations/Sponsorships	750.00
Albuquerque Chapter Registrations/Sponsorships	650.00
Oklahoma City Chapter Registrations/Sponsorships	3,000.00
Tulsa Chapter Registrations/Sponsorships	750.00
New Orleans & Baton Rouge Chapter Registrations/Sponsorships	0.00
Certification Workshop (2 Offerings)	4,000.00
Design Management	1,000.00
Sponsorships - National	4,000.00
Sponsorships - Website	5,000.00
Sponsorships - Region Annual Meeting	10,000.00
Student Chapter Sponsorships	2,500.00
Region Annual Meeting	22,000.00
Interest	0.05
Co-Sponsored Programs	0.00
<b>Total Revenue</b>	<b>\$74,050.05</b>

### Expenses

DBIA National's Audit Fees	0.00
Houston Chapter Meeting Expenses	0.00
San Antonio Chapter Meeting Expenses	0.00
DFW Chapter Meeting Expenses	2,000.00
Austin Chapter Meeting Expenses	500.00
Oklahoma City Chapter Meeting Expenses	2,000.00
Tulsa Chapter Meeting Expenses	500.00
New Orleans & Baton Rouge Chapter Meeting Expenses	0.00



Albuquerque Chapter Meeting Expenses	500.00
Certification Workshop (2 Offerings)	500.00
Conceptual Estimating	100.00
Design Management	100.00
Region Annual Meeting	15,000.00
Certification Renewal	150.00
Board Meeting Expenses	2,500.00
Bank Fees	1,550.00
Express Mail	100.00
Exhibit Fees	0.00
Insurance	400.00
Legal Fees	0.00
Management Fee	20,000.00
Management Commissions	15,000.00
National Expenses	4,000.00
Photocopies	500.00
Postage	100.00
Public Relations Contract	0.00
Supplies	45.00
President's/Board Travel	0.00
Staff travel to DBIA National	1,000.00
Staff travel Miscellaneous (incl. leadership)	1,000.00
Telephone	900.00
Website	1,000.00
National Student Competition Winner	1,500.00
Student Travel Expenses to Region Annual	3,000.00
<b>Total Expenses</b>	<b>\$73,945.00</b>
Profit/Loss	\$105.05

### Current Year to Date Comparison 2016

<i>Budgeted</i>		<i>Actual</i>	
Revenue	Expenses	Revenue	Expenses
\$70,050.05	\$69,895.00	\$59,435.00	\$51,788.49

As of December 13, 2016

### Statement of Assets and Liabilities

Included above