

## Scaffold and Access Industry Association (SAIA) Strategic Plan Recap

### Executive Summary

Throughout June 11 & 12 2024, the SAIA strategic planning group consisting of Crane Martin Management Staff and the SAIA Executive Committee met for two full-day strategic planning sessions facilitated by SME Strategy. Throughout these sessions, the SAIA team developed clarity and alignment around their One Destination, 3-years from now (2027).

To get started, the team worked through a current state analysis that included a discussion of their successes, a SWOT analysis and PESTLE trend analysis. Following this initial session, the team worked through several critical conversations around developing a clear 3-year vision, defining their core customer group as a part of their mission, refining their organizational values and behaviors, prioritizing their areas of focus, developing SMART goals and KPIs, and action planning to move their strategy forward.

The three priorities identified during the sessions are:

- Brand Awareness
- Technology
- Member Development
- Workforce Development

By accomplishing their goals within each of these strategic priorities, SAIA aims to move towards its 3-year One Destination vision where *SAIA is celebrating its 55th year by hosting North America's largest Scaffolding and Access Convention for 800 attendees. The association has grown to 520 member organizations, 60 of which are General Contractors and 35 are International beyond the US and Canada. We've worked to expand the diversity of our membership. SAIA provides the most up-to-date and comprehensive industry resources, training, and programs, accessible on-demand from anywhere. SAIA is financially stable, with a \$4 million operating budget and \$2 million in reserves.*

Additionally, SAIA aims to achieve its 3-year mission where *SAIA connects and educates members, driving safety and success throughout the elevated access industry.*

Moving forward, SME Strategy has recommended that the SAIA strategy team continue to refine their goals and action plans, as well as monitor their strategic plan on an ongoing basis to track progress and make proactive adjustments as required.

Executive Summary	1
Celebrate	3
SWOT Scan	4
PESTLE Trend Analysis	6
3-Year Vision	7
3-Year Mission	8
Values	9
Risks	10
Priorities & Goal Setting	12
Implementation Plan	14
Communication of the Strategic Plan	20
<b>Appendix</b>	<b>21</b>
Parking Lot	21
Survey Results	22

## Celebrate

- 2022 Boston / 50 Years
- First-Timers at meetings
- Scaffold Build Competition
- Highest reserves + budget ever
- Program revisions
- Apprenticeship program
- Content development
- ANSI / Influence in the standards world
- OSHA alliance / ambassadorship
- International partnerships
- Last year's convention highest attended ever
- Exhibit Hall sold out for 3 years
- Camaraderie
- Volunteer knowledge

## SWOT Scan

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>● Sponsorship participation + \$\$\$</li> <li>● Networking</li> <li>● Convention</li> <li>● Training quality</li> <li>● Commitment to being the source of training and development</li> <li>● Innovation</li> <li>● Engaged + knowledgeable staff</li> <li>● Mentorship</li> <li>● The amount of thruptut as a volunteer-run organization</li> <li>● Amount of time volunteers give</li> <li>● People Involvement</li> <li>● Resources (councils, webinars)</li> <li>● Members willing to help other members</li> <li>● Bringing in more women (ongoing)</li> <li>● Partnerships - being pursued by other organizations more</li> <li>● Competence</li> <li>● Reputation</li> <li>● Project Award submissions</li> <li>● Reputation</li> <li>● Helpfulness, information-sharing</li> <li>● Voice of the access industry</li> <li>● Everyone committed to improving safety</li> <li>● Member-focused</li> </ul>	<ul style="list-style-type: none"> <li>● Volunteer-dependent (time-to-market slow/tasks drag on)</li> <li>● Sometimes we back off putting our stamp on things to avoid liability</li> <li>● Outreach to younger crowds</li> <li>● Next-gen continuity</li> <li>● Outreach to other industries</li> <li>● Finding people where they are - we expect them to come to us</li> <li>● Lack of regional participation/opportunities (meetings, etc.)</li> <li>● Identifying good entry points for young people</li> <li>● Technology (website, app, ERP)</li> <li>● Our younger members don't put themselves out there</li> <li>● Same people on councils and committees</li> <li>● Sponsoring other events</li> <li>● Brand awareness outside of the industry</li> </ul>

Opportunities	Threats
<ul style="list-style-type: none"> <li>● Content development</li> <li>● Apprenticeship program</li> <li>● Targeting larger General Contractors (GC)</li> <li>● Getting GCs/EPs/EPCs to annual meetings</li> <li>● Getting GCs/EPs/EPCs to see our value - training, products, resources - what does their “Happy Meal” look like?</li> <li>● Partnerships</li> <li>● GCs/EPs/EPCs see SAIA as THE industry resource</li> <li>● Tech improvements - website, app</li> <li>● Have a presence in Trade Schools</li> <li>● Advocate to get scaffolding classified as a skilled trade</li> <li>● Prisoner reform</li> <li>● Reach middle managers</li> <li>● Regional presence/meetings</li> <li>● Explore what our relationship is to unions</li> <li>● Canadian resources</li> <li>● Translation of resources (Mexican Spanish, French Canadian)</li> </ul>	<ul style="list-style-type: none"> <li>● Different dialects on communications</li> <li>● Aging membership/ownership</li> <li>● Volunteers retiring</li> <li>● Economic conditions down turning</li> <li>● Mergers + acquisitions/continued industry consolidation</li> <li>● Not reaching the acquirer</li> <li>● Availability of the workforce who want to work in-person and do physical labor</li> <li>● Aging workforce</li> <li>● People in workforce without legal papers</li> <li>● Full benefits of SAIA not recognized</li> <li>● Perception of organization and events as “Good Old Boys’ Club”</li> <li>● Inability to deepen engagement</li> <li>● Minority-owned businesses not fully engaged</li> <li>● Global politics, tariffs, freight increases</li> <li>● Not fully supporting A92</li> <li>● OSHA processes take a long time</li> </ul>

### PESTLE Trend Analysis

What is happening in the world around us that is going to shape the future environment of our organization?

<b>Political</b>	<ul style="list-style-type: none"> <li>● Increasing Polarity</li> <li>● Uncertainty in global relations</li> <li>● Worsening relationship with China</li> <li>● Increasing federal regulations for federally funded jobs</li> </ul>	<ul style="list-style-type: none"> <li>● Increasing labor regulations</li> <li>● Increasing material regulations</li> <li>● Uncertainty around 2024 POTUS election</li> <li>● Increasing immigration</li> </ul>
<b>Economic</b>	<ul style="list-style-type: none"> <li>● Decreasing federal funding</li> <li>● Increasing interest rates</li> <li>● Increasing inflation</li> <li>● Decreasing labor force availability</li> <li>● Decreasing office space</li> </ul>	<ul style="list-style-type: none"> <li>● Increasing cost of travel</li> <li>● Increasing meeting costs (hotels, food + drink, etc.)</li> <li>● Decreasing desire of meeting vendors to negotiate</li> </ul>
<b>Social</b>	<ul style="list-style-type: none"> <li>● Increasing in-person events</li> <li>● Increasing hybrid work</li> <li>● Increasing next gen valuing social/family time</li> <li>● Increasing marketing platform influencers</li> </ul>	<ul style="list-style-type: none"> <li>● Increasing environmental consciousness (CSP)</li> <li>● Increasing M/WBE contractual requirements</li> <li>● Decreasing personal touch</li> <li>● Increasing anonymity</li> <li>● Decreasing “adulting” skills</li> </ul>
<b>Technological</b>	<ul style="list-style-type: none"> <li>● Increasing hybrid work</li> <li>● Fluctuating between electronic business-to-business vs face-to-face</li> <li>● Increasing AI</li> <li>● Increasing real time reporting (apps)</li> <li>● Increasing geofencing</li> <li>● Increasing technology overload</li> </ul>	<ul style="list-style-type: none"> <li>● Increasing 3D Printing of concrete</li> <li>● Increasing Building Integrated Process</li> <li>● Increasing Building Information Modeling</li> <li>● Increasing cost of digital advertising</li> <li>● Increasing mobile phone usage (apps, texting, etc.)</li> </ul>
<b>Legal</b>	<ul style="list-style-type: none"> <li>● Increasing regulations</li> <li>● Increasing taxation</li> <li>● Increasing tariffs</li> <li>● Shrinking labor pool</li> </ul>	<ul style="list-style-type: none"> <li>● Fluctuating federal investments</li> <li>● Increasing insurance</li> <li>● Increasing lawsuits + liability</li> </ul>
<b>Environmental</b>	<ul style="list-style-type: none"> <li>● Decrease in raw materials</li> <li>● Decrease in coal fire plants</li> <li>● Increase in extreme weather</li> </ul>	<ul style="list-style-type: none"> <li>● Increase in environmental abatement</li> <li>● Increase in wind/renewable energy</li> </ul>

### 3 Year “One Destination” Vision

Where do we want to go?

#### Aligned Team “One Destination” Vision 2027

In 2027, SAIA is celebrating its 55th year by hosting North America’s largest Scaffolding + Access Convention for 800 attendees.

The association has grown to 520 member organizations, 60 of which are General Contractors and 35 of which are International beyond US + Canada. We’ve worked to increase the diversity of our membership to include more women, next-gen, and people of color.

SAIA provides the most up-to-date and comprehensive industry resources, trainings, and programs, accessible on-demand from anywhere.

SAIA is financially stable, with a \$4 million operating budget and \$2 million in reserves.

#### Aligned Vision Points

1. Grown to 520 member organizations
  - a . 60 GCs
  - b . 35 International
2. Increased diversity of individual participants + member organizations
  - a . 35 women
  - b . 40 next gen (below 40)
3. Convention
  - a . celebrating 55th year
  - b . 800 attendees (most ever)
  - c . largest Scaffold & Access Expo in North America
4. Apprenticeship Program
  - a . complete
  - b . 250 graduated or current students
5. Resources and training are always updated and easily accessible - updated website, launched app
6. Financially stable
  - a . \$2 million Reserves
  - b . \$4 million Operating Budget

### 3 Year Mission

What is our purpose?

**Aligned Team Mission 2027**

SAIA connects and educates members, driving safety and success throughout the elevated access industry.

### Who are we? (Adjectives used to describe ourselves)

Voice, safe, experts, standard, innovative, knowledgeable, passionate, responsive, leaders, recognized as go-to, accessible, relevant, young, adaptive

### What do we do? (Benefits versus Features)

Safety, competence, knowledge acquisition, career growth/development, connecting people, personal fulfillment, help members be successful, education

### Who do we do it for? (Our main customer)

GCs, subcontractors, end-users, end-users who don't have a voice, families of end-users, masons, laborers, trade workers, carpenters, forklift drivers, pedestrians, historic places, business owners, manufacturers, trainers, **members**, non-member end-users, inspectors, architects, engineers, regulatory professionals, elevated access industry, workers in the elevated access industry



## Values

Important questions for value reshaping:

- What are the impacts if we reward non-ideal values?
- What are the impacts when people live our ideal values?
- What specific behaviors can be demonstrated to ensure your values move from implicit to explicit?
- What are the benefits of reshaping your values in your organization?
- How can we reshape the values throughout our organization?

<b>Current Values &amp; Behaviors</b> Good, not-so-good, or neutral	<b>Desired Values &amp; Behaviors</b> What do we want to replicate throughout our organizations to help us reach our vision?
<ul style="list-style-type: none"> <li>● Excellence</li> <li>● Education</li> <li>● Knowledge</li> <li>● Integrity</li> <li>● Safety</li> <li>● Service</li> <li>● Collaboration</li> <li>● Overcommitment</li> <li>● Overextended</li> <li>● Fatigue</li> <li>● Process stifling</li> <li>● Complacency</li> <li>● Risk/liability avoidance</li> <li>● Creativity</li> <li>● Transparency</li> <li>● Fun</li> </ul>	<ul style="list-style-type: none"> <li>● Excellence</li> <li>● Education</li> <li>● Knowledge</li> <li>● Integrity</li> <li>● Safety</li>   <li>● Diversity</li> <li>● Creativity</li> <li>● Fun</li> <li>● Passion</li> <li>● Tech advanced</li> <li>● Influential</li> <li>● Collaboration</li> <li>● Boldness</li> <li>● Energy</li> <li>● Attentiveness</li> <li>● Accountability</li> </ul>

## Risks

Questions to consider while working through the risk register:

- What risks and uncertainties exist for your organization?
- What is the impact and likelihood of them happening?
- Review those that multiply to 16 or higher
- ***Your strategic priorities will address and mitigate the critical risks based on their rating***

### IMPACT

How severe will it be if it happens?

5	Catastrophic
4	High impact
3	Medium impact
2	Little impact
1	No impact

### LIKELIHOOD

What are the chances of it occurring?

5	Happening now
4	Very likely
3	Moderately likely
2	Unlikely
1	Very unlikely

Risk	Impact	Likelihood
Not enough time - volunteers	5	5
Not enough time - staff	5	5
Not having enough staff	5	5
Not having enough volunteers to power initiatives	5	5
Not keeping up with tech changes	4	5
Not communicating/messaging how fun the industry is	5	5
Not attracting the younger generation	5	5
Lack of leadership buy-in to plan	5	1
Lack of staff buy-in to plan	5	1
Lack of member buy-in to plan	4	3
Lack of buy-in from those who have been around a while and helped create/drive the last strategic plan	3	3
Economic downturn	5	3
Fear of taking a chance, so then not taking it/doing nothing	5	1
Fear of upsetting others, so then doing nothing	5	1
Fear of legal action, leading to inaction	4	2
Finding an appropriate site for the 2027 convention	5	1
"Choosing" in the face of diversity could alienate someone	2.5	2

Choosing diversity for diversity's sake, shifting organizational values	5	1
Delivering a disappointing product (web + app)	5	2
Investing time, money, and resources in Web and App to low reception/buy-in	3	3
Selecting the wrong company to do an app project	5	2
Not shifting our paradigm from "the way things have been done" - content/education/training volunteer-driven work to developer-driven with volunteer input + support	5	2
AI recognized as the source of knowledge vs. SAIA	2	3
Industry labor shortage (laborers)	2	5
Industry shortage ("white collar")	3	5
Not having champions to drive to plan	5	2
Not staying in alignment around overall direction once work/priorities/deliverables are flushed out	5	2
Apprenticeship Program not approved by trade schools/DOL	5	2

## Priorities & Goal Setting

Strategic Priority #1 <b>Brand Awareness</b> Champion	Strategic Priority #2 <b>Technology</b> Champion	Strategic Priority #3 <b>Member Development</b> Champion	Strategic Priority #4 <b>Workforce Development</b> Champion
<p><b>Why:</b> To encourage, engage, attract, and promote awareness for the association.</p>	<p><b>Why:</b> To provide user-friendly tools, to disseminate content and information, and to keep us relevant.</p>	<p><b>Why:</b> Member development and growth underpins the 2027 strategic plan</p>	<p><b>Why:</b> Workforce development and growth underpins the 2027 strategic plan</p>
<p><b>Objectives</b> How could we measure success? What outcomes do we want to see?</p> <ul style="list-style-type: none"> <li>● # Social media followers</li> <li>● # Social media posts</li> <li>● Social media engagement</li> <li>● # Subscriber list</li> <li>● # Attendees at meetings</li> <li>● # Exhibitors</li> <li>● # Sponsors</li> <li>● # Members</li> <li>● \$\$ revenue</li> <li>● \$\$ profit</li> <li>● # Sales by product</li> <li>● # ATIs</li> <li>● \$\$ ad sales</li> <li>● # Ads placed in other publications</li> <li>● # Hashtags used/followed</li> </ul>	<p><b>Objectives</b> How could we measure success? What outcomes do we want to see?</p> <ul style="list-style-type: none"> <li>● New website developed + launched</li> <li>● App developed + launched</li> <li>● Website SEO</li> <li>● Duration of visitors to the website</li> <li>● # Unique visitors to the website</li> <li>● # Resources accessed from the website</li> <li>● # Training programs automated</li> <li>● Turn-around time of information updates</li> <li>● Turn-around time on training certifications delivered</li> <li>● # App downloads</li> </ul>	<p><b>Objectives</b> How could we measure success? What outcomes do we want to see?</p> <ul style="list-style-type: none"> <li>● # Members</li> <li>● # GC members</li> <li>● % Diversity</li> <li>● # Women individuals participating</li> <li>● # Next-gen individuals participating</li> <li>● # BIPOC individuals participating</li> <li>● # Attendees at Committee Week</li> <li>● Outputs from CW</li> <li>● # Qualified volunteers</li> <li>● # Engaged SAIA social</li> <li>● # Volunteer deadlines met/missed</li> <li>● # Projects implemented</li> <li>● # Regional meetings</li> </ul>	<p><b>Objectives</b> How could we measure success? What outcomes do we want to see?</p> <ul style="list-style-type: none"> <li>● # Students trained</li> <li>● # ATI's</li> <li>● # ATI Locations</li> <li>● # ATI Instructors</li> <li>● New content developed</li> <li>● # Trainers and Students Utilizing the LMS</li> <li>● DOL Approved and Registered Apprenticeship Program</li> <li>● Actively working with career development organizations</li> </ul>

	<ul style="list-style-type: none"> <li>● app usage</li> <li>● # Regular reviews + updates of website</li> <li>● # Regular reviews + updates of app</li> <li>● # Member list joins</li> </ul>	<ul style="list-style-type: none"> <li>● # Attendees at regional meetings</li> <li>● # Internal trainings created</li> <li>● # Participants completed internal training</li> </ul>	
<p><b>Goals</b> Bold 3-4 of the above objectives and revise them into SMART goals here:</p> <ul style="list-style-type: none"> <li>● Go from 430 to 460 members by 12/31/25</li> <li>● Go from 460 to 490 members by 12/31/26</li> <li>● Go from 590 to 520 members by 12/31/27</li> <li>● Go from presence on 3 to 5 social media platforms</li> <li>● Go from 530 to 620 Convention Attendees in July 2025</li> <li>● Go from 620 to 710 Convention Attendees in July 2026</li> <li>● Go from 710 to 800 Convention Attendees in 2027</li> <li>● Increase revenue 10% year-over-year 2025-2027</li> </ul>	<p><b>Goals</b> Bold 3-4 of the above objectives and revise them into SMART goals here:</p> <ul style="list-style-type: none"> <li>● Launch new website by 1/2/26</li> <li>● Launch app by 3/1/26</li> <li>● Increase unique visitors to the website by 25% between Jan - April 2026</li> <li>● Increase resources accessed from the website by 25% between Jan – April 2026</li> <li>● 250 app downloads by 2/1/26</li> </ul>	<p><b>Goals</b> Bold 3-4 of the above objectives and revise them into SMART goals here:</p> <ul style="list-style-type: none"> <li>● Go from 150 to 180 qualified volunteers by 12/31/25</li> <li>● Develop and conduct 2 internal training sessions (1 BOD, 1 council) by 2/28/25</li> <li>● 5 regional meetings held by the Board of Directors, councils, and ATIs by 12/31/25</li> <li>● Develop and conduct new and existing member education webinars to be held twice a year, first to be held by 1/31/25</li> </ul>	<p><b>Goals</b> Bold 3-4 of the above objectives and revise them into SMART goals here:</p> <ul style="list-style-type: none"> <li>● Go from 5,000 to 5,500 students by 12/31/25</li> <li>● Go from 5,500 to 6,050 students by 12/31/26</li> <li>● Go from 6,050 to 6,655 students by 12/31/27</li> <li>● Launch Registered Apprentice Program by Summer 2025</li> <li>● 250 Active participants in the apprentice program by 2027</li> </ul>

## Implementation Plan

<b>SP1: Brand Awareness</b> <b>Champions: EC: Michael Paladino and Stefanie Bayard -</b> <b>Staff: DeAnna Martin</b>		
Milestone/Deliverable	Responsibility	Target Completion Date
<b>Goal 1:</b> a) Go from 430 to 460 members by December 31, 2025 b) Go from 460 to 490 members by December 31, 2026 c) Go from 490 to 520 members by December 31, 2027	Christina Reed	12/31/25 12/31/26 12/31/27
Partner with other industry associations (NAWIC, NARC, ASSP, AGC, ABC)	CR, JD, DM	EOY - Each Year
Identify organizations and sectors to reach out to	CR, PD	EOY - Each Year
Establish GC outreach and tracking	CR	EOY - Each Year
Identify companies, associations, and industries that could be a possible member opportunity	CR	EOY - Each Year
Focused outreach process to engage those specific companies, associations, and industries	CR	EOY - Each Year
Prospect lead nurture - multiple follow-ups automated to non-members	CR	EOY - Each Year
Host virtual membership engagement meetings	CR, JD, PD	EOY - Each Year
<b>Goal 2: Growing and maintaining presence on social media platforms</b>	Jackie Davis	12/31/27
Create message topics/priorities - safety tips, worker education resources, SAIA membership benefits	JD	EOY - Each Year
Identify content + messaging our members want to see	JD, CR, PD	EOY - Each Year
Have members send us videos, pictures, etc. for social posts - post 1/week	JD, CR, PD	EOY - Each Year
Create a social media calendar for what we want to post month over month and number of posts	JD, CR, PD	EOY - Each Year
Make engaging videos	JD	EOY - Each Year

<b>Goal 3:</b> a) Go from 530 to 620 Convention Attendees in July 2025 b) Go from 620 to 710 Convention Attendees in July 2026 c) Go from 710 to 800 Convention Attendees in 2027	AW, JD, CR, PD	Convention 8/25 Convention 7/26 Convention 2027
Identify local companies and associations in each location	PD	4 months prior
Outreach plan for reaching out to companies and associations to attend convention	CR	4 months prior
Determine the attendee category makeup to ensure adequate and appropriate space	AW	12/31/25
Get local trade associations involved	CR	3 months prior
Establish GC outreach and tracking for attending the convention	CR	6 months prior
<b>Goal 4: Increase revenue by 10% year-over-year in 2025, 2026, and 2027</b>	DeAnna Martin	12/31/25 12/31/26 12/31/27
Increase the cost of manual of responsibilities	DM	1/1/26
Review fees (membership, registration, exhibitor, sponsorship, training)	Team	Pre-budget - Each Year
Secure royalty contracts for standard sales	JD	12/31/25
Develop and revise training content	JD	12/31/27

<b>SP2: Technology</b> <b>Champions: EC: Matt Morgan and Frank Frietsch</b> <b>Staff: DeAnna Martin</b>		
<b>Milestone/Deliverable</b>	<b>Responsibility</b>	<b>Target Completion Date</b>
<b>Goal 1: Launch new website by January 2, 2026</b>	<b>JD, DM</b>	<b>2/2/26</b>
Form Web + app ad-hoc team	JD	7/26/24
Write, issue, award RFP	JD	10/31/24
Set ad-hoc outline for development, review current state, set priorities for what new site should look and function like	JD	12/31/24
Beta test November 1, 2025	JD	11/1/25
<b>Goal 2: Launch the app by March 1, 2026</b>	<b>JD, DM</b>	<b>3/1/26</b>
Create a survey for members about what they want to see before development	JD	12/31/24
Form web + app ad-hoc team by July 5, 2024	JD	7/26/24
Write, issue, award RFP	JD	10/31/24
Beta test February 1, 2026	JD	2/1/26
<b>Goal 3: Increase unique visitors to the website by 25% between January 2, 2026, and April 1, 2026</b>	<b>Jackie Davis</b>	<b>4/1/26</b>
Link the SAIA site to member posts/websites to increase engagement	JD, CR	2/28/26
Link to Whova app	JD, PD	Before meetings
<b>Goal 4: Increase resources accessed from the website by 25% between January 2, 2026, and April 1, 2026</b>	<b>Jackie Davis</b>	<b>4/1/26</b>
Develop marketing plan	JD	12/1/25
Create QR Codes on all marketing materials	JD	12/1/25
<b>Goal 5: 250 app downloads by August 1, 2026</b>	<b>Jackie Davis</b>	<b>8/1/26</b>
Create QR Codes on all marketing materials	JD	2/1/25
Develop marketing plan	JD	12/1/25



<b>Goal 4: Increase resources accessed from the website by 25% between January 2, 2026, and April 1, 2026</b>	<b>Jackie Davis</b>	<b>4/1/26</b>
Develop marketing plan	JD	12/1/25
Create QR Codes on all marketing materials	JD	12/1/25
<b>Goal 5: 250 app downloads by August 1, 2026</b>	<b>Jackie Davis</b>	<b>8/1/26</b>
Create QR Codes on all marketing materials	JD	2/1/25
Develop marketing plan	JD	12/1/25

<b>SP3: Member Development</b> <b>Champions: EC: Tom Brewer and Chris Moody</b> <b>Staff: DeAnna Martin</b>		
Milestone/Deliverable	Responsibility	Target Completion Date
<b>Goal 1: Go from 150 to 180 qualified volunteers by December 31, 2025</b>	<b>DeAnna Martin</b>	<b>12/31/25</b>
Develop a list of needed qualifications	EC, DM	12/31/24
Define team to qualify volunteers	MB, DM	12/31/24
Call for Volunteers campaign	JD, DM	1/1/25 - as necessary
Identify current volunteers and needs	JD, DM	8/31/24
<b>Goal 2: Develop and conduct 2 internal training sessions (1 BOD, 1 council) by February 28, 2025</b>	<b>DeAnna Martin</b>	<b>2/28/25</b>
Identify what we are requiring of volunteers	DM	9/1/24
Outline + develop pertinent content	DM	9/1/24
Determine who to conduct	DM	9/1/24
Refresh/review current training	DM	9/1/24
Get input from leaders in SAIA	DM	9/30/24
<b>Goal 3: 5 regional meetings held by the Board of Directors, councils, and ATIs by December 31, 2025</b>	<b>Christina Reed</b>	<b>12/31/25</b>
Identify a program or topic to present that will draw local interest	BOD, CR	12/31/24
Discuss regional meeting expectations with the board	CR	10/1/24
Determine who will set the format of the meetings	CR, JD, DM	11/1/24
Develop regional site host and event plan	CR, AW	12/31/24
Determine board + staff attendance	CR	12/31/24
Write up post-even assessments/lessons learned	CR	Following the event
<b>Goal 4: Develop and conduct new and existing member orientation to be held twice a year</b>	<b>CR, JD</b>	<b>1/31/25</b>
Create member orientation PowerPoint	CR	11/29/24

<b>SP4: Workforce Development</b> <b>Champions: EC: Tracy Dutting-Kane and Roger Jetton</b> <b>Staff: DeAnna Martin</b>		
Milestone/Deliverable	Responsibility	Target Completion Date
<b>Goal 1:</b> a) Go from 5,000 to 5,500 Students by December 31, 2025 b) Go from 5,500 to 6,050 Students by December 31, 2026 c) Go from 6,050 to 6.655 Students by December 31, 2027	JD, CC	12/31/25 12/31/26 12/31/27
Partner with other industry trade associations	JD, CR, DM	EOY - Each Year
Identify safety organizations and sectors to reach out to	JD	EOY - Each Year
Establish GC outreach and tracking	JD	EOY - Each Year
Make training records and upcoming training courses due for renewal accessible to students through a student portal.	JD	EOY - Each Year
User-friendly student portal to sign up for local training and participate in online content.	JD	EOY - Each Year
Adopt an optional hybrid approach with virtual instructor-led and in-person hands-on practical portions of the course.	JD	EOY - Each Year
Improve our student's overall experience through technology.	JD	EOY - Each Year
<b>Goal 2: Launch Apprenticeship Program</b>	<b>Jackie Davis</b>	<b>7/31/25</b>
Develop content.	JD	12/31/24
Beta test with a group of trainers.	JD	1/31/25
Work with DOL on registration of the program.	JD	6/30/24
Reach out to any career development contacts to build traction.	JD	6/30/24
Develop a marketing plan for launch.	JD	1/1/25
<b>Goal 3: 250 Active participants in the Apprenticeship Program</b>	<b>Jackie Davis</b>	<b>12/31/27</b>
Work with other trade organizations to adopt the program.	JD	EOY - Each Year
Utilize our media outlets to spread the word.	JD	EOY - Each Year
Reach out to past students to see if they would be interested in participating.	JD	EOY - Each Year

### Communication of the Strategic Plan

What are you going to do to communicate and share your strategic plan throughout your organization?

- Who needs to know what, by when, and to what extent?
- What communication structures do you need to put in place internally to be successful (ex: strategy meeting cadences, strategy review cycles)
- Where can you incorporate strategy discussions into existing communications?

Milestone/Deliverable	Responsibility	Target Completion Date
Meet as a strategy team to debrief and follow up on the strategic plan	DeAnna	7/12/24
Documented plan, one-pager, goal + action tracker sent to SAIA	Jen (SME)	6/26/24
Book the first follow-up call with your facilitator	Jen (SME) + DeAnna	6/26/24
Book a second team follow-up call with your facilitator	Jen (SME)	7/31/24
Executive Committee to approve strategic plan to be presented to the SAIA Board of Directors (BOD)	EC	8/31/24
Board of Directors to approve strategic plan	BOD	10/1/24
Strategic Plan presented to the SAIA Membership	DeAnna	11/1/24

## Appendix

### Parking Lot

What was left un-discussed that needs to be revisited?

- Training materials + external communications - translations for Mexican Spanish and French-Canadian
- Additional Board Members? Do bylaws need to change?

## Verbatim Survey Results

### If you had 3 wishes that would make the association run better, what would they be?

#1. A phone app for people to use while working in the field.

#2. A streamlined user-friendly website.

#3. Timely review process of educational content and technical documents.

1. Increased member participation - 2. Region meetings - 3. Technology update  
More Regional Promotion, More General Contract and Subcontractor outreach to increase awareness and membership, younger member participation

1. Build SAIA brand and reputation as the Vertical Access Industry renowned application, product, and Safety experts for knowledge and support resources.

2. Provide industry-leading training to deliver, share, and multiply this access knowledge to users in North America and other areas SAIA may serve.

3. Engage and expand association membership with companies and professionals that value the knowledge, skill, expertise, and services that SAIA provides; and with companies that share SAIA industry values and will contribute to the association's mission and success.

More automated store for available products,

updated website - more links to available information, easier to navigate

better communication with leadership

Additional Staff, Data-Driven Decision Making, Enhanced Communication and Collaboration Tools

More involvement by the entire EC on site selection and dates of convention and committee week. Speed up the R&R review process.

Clear direction from leadership on their goals. Updated technology. Project management training for staff and volunteers.

Less politics, better worked out programs (training, verification/certification)

Better communication between management, President, EC, and board members. A recruitment system that appeals to a variety of members to obtain a broader spectrum of candidates for the Board, Council, and Committee Chairs.

1) Additional administrative full-time staff support

2) Additional staff support on-site at meetings

3) Elevation of professionalism

This may sound cliché, but I do not think there is much wrong with the support we get, and the way things run. That said.

1- More non-biased communication about safety and how it affects all of us and all of our businesses.

2- Continued emphasis on growth and involving our younger generation of next industry leaders.

3- General communication. Keeping together and talking, possibly seeing each other while still performing our day jobs. This is a fault of mine.

### **In your ideal world, what would the association look like in 3 years?**

Having more of a prominent presence with general contractors (GC's) and all end users of equipment.

Industry leader in providing and accessing scaffold worker safety resources, education programs, and communication.

SAIA would truly be seen as the scaffold and access industry expert. Currently only members truly know what SAIA is and what the association can do for you. SAIA should be seen as the go to for all projects when it comes to scaffolding and access. SAIA should be working with GC's on ensuring best practices for installation/dismantle, inspection, safety, tie off, etc. instead of GC's relying on what their safety programs read which are typically more an issue to scaffolding companies. SAIA should be performing National and Regional presentations educating both GC/Subcontractors on their training, committees, products, etc. that would greatly benefit every jobsite.

A powerful, well-recognized and respected Vertical Access Industry association whose SAIA logo carries a valuable brand perception equivalent to the "Good Housekeeping" seal in consumer products.

incorporate General Contractors into membership, larger outreach/collaboration with international scaffold organizations, full library of updated top of the line educational programs and products

Continuing to develop a diverse membership base representing various demographics, expertise levels, and geographic locations. Members are highly engaged, with high participation rates in events, forums, and committees.

The association needs to continue its efforts to be the go-to association for all scaffold and access safety and training needs.

SAIA would be the leader in developing programs and resources for the industry. We would work with OSHA to ensure every construction worker receives training before stepping on a job site. Thus, reducing accidents. With the reduction of accidents, wages would increase, and employer liability would decrease.

Deeper penetration in the US, Canada and Mexico markets, having the SSFI certification program in place, better dates for committee week and convention, get large companies to sign up as well

Being able to supply training to a larger audience within North America. Expanding our technology capabilities in our industry.

A more diverse membership base, including more international members.

To be recognized as an industry leader on a broader scale.

It would be healthy, involve old and new ideas, cutting edge on safety and move a little faster on change. More adaptive. BTW, we have already come a long way in these areas. Cudos to SAIA and DeAnna's team.

### **What might hold us back from getting to that place?**

A lag to get reviewed resources in front of workers digitally in the field.

Content development

Not having the right person who can do the presentations and not having buy in on promoting regionally.

We will be limited and less robust if there is not a solid and clear strategic focus and concentrated effort on the biggest, most valuable initiatives that can build such organizational effectiveness on the key points outlined above.

Available time of members to foster and develop relationships and products

Not adapting to a culture of innovation or invest in new technologies

Not considering the target audience of training programs. For example, we have a large demand for a training course we can offer to someone that will never erect or dismantle a scaffold but has been tasked with inspecting scaffolds daily to comply with OSHA's requirements.

The next President and support they give OSHA. Money talks and we need buy-in from politicians.

Hesitance to spend money for services, control issues, large companies do not see enough value in the association

The need for more ATI's. The resistance to change and development within the.

Too many differing opinions on how to get there, causing lack of action.

Status Quo. Unwillingness to adapt and change.

### **What other challenges or roadblocks do you think we need to address in the future to maximize our success?**

Speed of delivery due to so many levels of review and approval by volunteers who might not have the time needed to be in leadership roles.

Website - SEO - Mobile Apps

Young Member outreach

Much of the work done by the association is through volunteer work from member participants on committees and other programs. How much work and progress can be generated by volunteer efforts could govern and limit initiative progress and output.

?

NA

The older generation is beginning to retire. Not certain the younger generation has bought into the value the association brings.

A lack of volunteers to develop resources and a delay in the resources getting published.

...

The ability to access historical information from past administrations. The inconsistency of various regulations within our industry.



As we try to expand into international markets, other countries have different expectations, and are not as "casual" as Americans, in both our language and appearance. We should always err on the side of being more professional and know the audience we are addressing.  
More transparency of ideas and communication.

**As an association what would you say are our strengths?**

Our sense of community.  
Knowledge, membership, community  
Committee's and membership safety/product knowledge  
Lots of smart, committed, knowledgeable and experienced vertical access professional members, supported by a good staff who understand this specialized industry.  
we are a solid group of knowledgeable individuals all trying to improve our industries through safety and education  
We have built a highly engaged membership base that actively participates in events, forums, and initiatives. We also have a strong focus on safety within the Scaffold and Access Industry, promoting best practices and high safety standards.  
We have a strong management team with Crane Martin and dedicated members serving on EC, Board of Directors, and council chairs.  
Building relationships within the membership, even if they are competitors. We are developing safety programs and resources for the industry. We are increasing and keeping members.  
Increase attendees, exhibitors, and sponsors at our annual convention.  
Good brand, engaged members (depending on area)  
Training program, the expertise of its members, the energy of its members.  
Longevity of the association and not being too large. This keeps the level of professional relationships among members and staff thriving.  
Experience. Devotion. Comradery. Loyalty. Knowledge.

**As an association what would you say are our weaknesses?**

We need to let new people into leadership roles and start focusing on the development of the next generation of volunteers. Let go of the good old boys club.  
Direction, path, spending money  
Outreach and Promotion  
Perhaps trying to be too much for too many constituents. Also, sometimes it is too heavily manufacturer focused and needs more application and service provider consideration to better support those who actually put the equipment in service.  
we need to find better ways to reach the average worker or person who would benefit most from the products that we develop  
NA  
Recruiting the youth.

Lack of volunteers or volunteers who are unable to give the time necessary. No BOD training and a lack of BOD participation.

Relying too much on volunteer work, trying to control too much through the management company

Casting a broader net to get our brand out for others to see, a complacent Board of Directors, delays in safety training programs from inception to completion.

Not enough diversity in the membership base.

Somewhat set in our ways.

### **What opportunities do you see out there for our association?**

Appealing to people through different outlets of technology.

Content development, enhancing relationships with international scaffolding safety organizations, general contractors, expanding training reach

GC and large Subcontractor end users joining the association

Much of my thoughts are outlined above. the Strategic Business assessment and planning process should highlight the association's greatest opportunities that are aligned with the Vision, Mission and Values deemed important to our long-term success.

expansion into the general contractor world and increased international reach thru development of collaborations with other established organizations

Public Awareness Campaigns aimed at enhancing awareness among both the public and industry stakeholders regarding the critical importance of safety protocols and best practices in scaffold and access work. Additionally, advocate for the implementation of an Apprenticeship Program, offering individuals seeking education within the trade industry an opportunity to increase the knowledge necessary for success while fostering their higher education aspirations.

Training, Training, Training.

A growing of our alliances with other safety organizations both domestically and internationally.

Large members, EPCs, and Mexico clientele

Widening our member base such as, bringing in building contractors as members and continuing to foster a growing international presence in our industry.

I'm sure there are other scaffold industry meetings where we could explore and target to add to the diversification of the membership base.

More exposure. More letting Large GC's and plants and owners know what we do, what we offer and what a value we are for the entire Construction industry.

### **If you had to pick one goal or target for us to hit over the next 12-24 months, what would it be?**

Development of a phone app to get our council resources out to the public.

Completing the Apprenticeship program and approval from DOL

Getting GC participation.

My Number 1. Build SAIA brand and reputation as the Vertical Access Industry renowned application, product, and Safety experts for knowledge and support resources.

All efforts underpinned to achieve this overriding objective.

launch the Apprenticeship Program and work toward getting Scaffold recognized as a Trade in the US

Invest in the latest technologies to improve safety standards, training programs, and industry practices, positioning the association as a leader in innovation. This would go along with meetings and events as well.

Complete the updates of the CPT manuals and PP presentations and finalize development of a CPT Inspectors course.

The A11 Committee is to have all 6 standards published. The training courses are all up to date. The Apprenticeship Program was developed.

More hired work.

Growing the membership and encouraging them to be active participants in the association.

Successfully recruiting new international members to join, become involved in the association, and attend our annual meetings.

Increase Membership and interest.

### **What would you say our core values are?**

A welcoming community

Same as listed on website - excellence, education, knowledge, integrity, Safety, Education, Training

Striving to be the access industry experts. Support is members business needs. Build a network of access industry professionals to strengthen our industry and association for the benefit of its members.

#### **EXCELLENCE**

Committed to excellence in developing and promoting best practices in the scaffold and access industry.

#### **EDUCATION**

Educate through training, deliverables, and regulatory collaboration.

#### **KNOWLEDGE**

Provide expertise, direction, and resources to industry professionals.

#### **INTEGRITY**

Act in accordance with the highest professional standards, avoiding real or perceived conflicts of interest whenever possible and to disclose them to affected parties when they exist.

#### **SAFETY**

Dedicated to the highest standards of safety in the scaffold and access industry

We value safety and innovation within the Scaffold and Access Industry. We also want to foster an environment where these standards and resources are accessible to everyone

regardless of background/opportunities.

Honesty, Positive mental attitude, willing to do more than just what is required.

Ensuring that the end users come home safely.

EXCELLENCE

EDUCATION

KNOWLEDGE

INTEGRITY

SAFETY

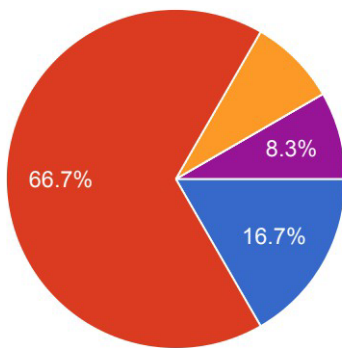
Had to look it up on the website.

Continue to promote the core values that are in place.

Being the leader in the scaffold & access industry's safety, training, and education.

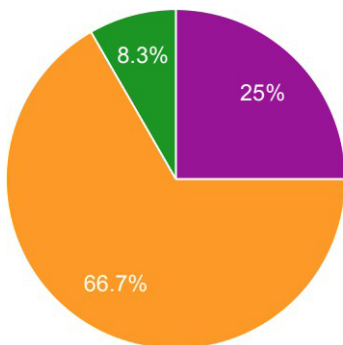
Safety, Honesty, integrity, fun organization, people-oriented, respected, and respectful.

**How does your association work through conflict, difficult discussions, or disagreements?**



- We have an effective process in place for managing conflict, di...
- Sometimes we work through these well, and other times it...
- We tend to avoid conflict, difficult discussions and disag...
- We have a lot of friction, frustration or anger when conf...
- We really don't have a lot of disagreements. Items are pre...

**Which phase of team development do you feel is most applicable to your group?**



- FORMING: We are a relatively new team, and we're still getti...
- STORMING: We are not a new team. We experience regular...
- NORMING: We are an established team with agreed...
- PERFORMING: We are a highly functional team who are perfo...
- I don't know which stage we are at.

**Is there anything else that you think that we should know, or that you want to share?**

We need to figure out how to get our BOD more involved. The Executive Committee represents the Board of Directors and at times it seems like the other way around.

Keeping our focus on being a safety organization for the workers in the field. At the end of the day our focus should be to bring everyone home safe.

we are a Safety organization and must not lose track of that

no

NA

Nope

Let's get it done!

I am very proud of the long and storied reputation of the SAIA. Our people our finest resource. I think some of the finest people anywhere, represent us. I am proud to this organization.