

## **Cogence Alliance Strategic Plan 2026–2028**

Adopted by the Cogence Alliance Board of Directors

President: Jennifer Son, The Ohio State University

Vice President / Program Chair: Sean McDermott, Cleveland Metroparks

Treasurer: Bob Hager, Brennan, Manna & Diamond

Immediate Past President: Scott Wagner, Regency Construction

Secretary (Non-Voting): Kevin Thompson, Cogence Alliance

Committee Chairs

- Resources: Brenden Shea, Next Generation Construction
- Emerging Leaders: Matt Morgan, Karpinski Engineering

At-Large Directors

Jeff Appelbaum (Thompson Hine LLP / Project Management Consultants LLC)

Kris Edwards (Valley Interiors)

Jerry Klanac (University of Dayton / PMA Consultants)

Pat Klanac (PTA Engineering)

Jonathan Wilch (DLR Group)

Chapter Presidents

- Northeast Ohio: Carter Edman, Marous Brothers Construction
- Central Ohio: Adrienne Sraver, Barton Malow Builders
- Southwest Ohio: Steve Lawson, Shook Construction

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### Executive Summary

Cogence Alliance occupies a distinctive position within the design and construction industry as a multi-disciplinary, non-hierarchical forum that brings together owners, designers, constructors, and allied professionals outside of projects. Through candid dialogue and shared learning, Cogence fosters trust, transparency, and improved project outcomes.

The 2026–2028 Strategic Plan focuses on strengthening organizational sustainability, maintaining our operational distinctiveness and quality, elevating Cogence’s visibility and external credibility, and expanding its impact through education and talent cultivation. Over this planning period, Cogence will prioritize initiatives that reinforce its mission while ensuring organizational capacity aligns with ambition.

Key strategic priorities include expanding our influence through strengthened relationships with educational institutions and an expanded geographical reach, developing more effective strategies for both resource development and brand utilization. Success indicators include internal and external criteria, such as engagement, funding sustainability, and program participation, that measure the organization’s growing influence within the regional and national design and construction dialogue.

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## Vision

To be a nationally recognized, locally rooted platform that measurably improves how design and construction projects are conceived, aligned, and delivered by cultivating a trusted, cross-disciplinary community.

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## Mission

Cogence Alliance brings together Owners and Developers, Architects and Engineers, Construction Managers and Contractors, and Allied Industry Professionals to advocate and be a resource for improved project delivery.

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## Context and Strategic Assessment

Cogence Alliance's model is unique within the design and construction industry. Its intentionally non-hierarchical, cross-disciplinary structure creates a rare environment for open dialogue on industry challenges and opportunities. Cogence forums allow participants to engage outside of their projects, enabling candid discussion, mutual understanding, and shared learning.

Participants consistently cite the value of exposure to alternative perspectives and the trust fostered through roundtable engagement. This culture is central to Cogence's identity and differentiates it from traditional professional associations.

## Chapter Snapshot

- Northeast Ohio: A mature and stable chapter with sustained engagement and strong professional representation. The chapter provides leadership in programming consistency and organizational memory.
  - Central Ohio: Following a post-pandemic stabilization period, the chapter has developed a highly engaged cohort of emerging and mid-career leaders positioned to influence their organizations and the broader market. The chapter is well-positioned to emphasize education and outward-facing engagement. Completion of *The Cogence Way* framework will support consistent messaging and outreach.
  - Southwest Ohio: A growing chapter with strong construction and engineer engagement, focused on strengthening continuity, participation, and regional relevance. Continued support and alignment with national initiatives will be key to sustained momentum.
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## Strategic Goals and Objectives (2026–2028)

All goals support increased organizational recognition, credibility, and long-term sustainability while advancing Cogence's mission.

### Goal 1: Maintain excellence by continuing our Core Activities

- Provide thought provoking Roundtable programming with regional relevancy
- Enhance and grow the Emerging Leaders Program
- Supplement the Executive Director position with dedicated resources as appropriate
- Responsibility for this goal is shared among the Executive Board.

Goal 2: Strengthen Relationships with Educational Institutions: Establish and foster partnerships that raise awareness of Cogence and support talent development and education.

- Launch a Cogence Alliance scholarship program and award inaugural scholarships in all three chapters by Spring 2027.

- Announce the scholarship program at the September 2026 Town Hall.
- Evaluate the feasibility of sponsoring a design and construction competition for college-age students and, where appropriate, other industry trainees.
- Establish a sustainable funding model to support annual awards.
- Establish liaison with higher education institutions with industry curricula and advance awareness of Cogence, our values, and seek opportunities to insert the Cogence Way into their programs.
- Accountability for this goal is assigned to Robert Hager.

### Goal 3: Expand Geographic Region of Influence

- Conduct pre-work to inform and prepare for expansion into a fourth market.
- Indianapolis and Pittsburgh have been identified as initial candidate markets.
- Develop an expansion framework that reflects lessons learned from prior growth efforts.
- Decision in May 2027.
- Accountability for this goal is assigned to Sean McDermott.

### Goal 4: Establish Effective Resource Development Function

- Define and market The Cogence Way
- Leverage Resources committee in a more inspirational way. Big work product deliverables. Work with Brendan on this.
- Chapter presidents to send out a key take-away in follow up to roundtables.
- Accountability for this goal is assigned to Jennifer Son.

### Goal 5: Develop Partner Certification/Brand Usage Strategy

- Explore how the Cogence brand might be leveraged as a distinguished qualifier for our partners.
- Provide proposal by end of year, 2026
- Accountability for this goal is assigned to Scott Wagner

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### Core Strategies

To ensure consistent and manageable execution, Cogence will:

1. Establish Cross-Chapter Committees. Committees composed of representatives from each chapter will be formed for each strategic initiative, with a representative of the Executive Committee responsible for advancement of each goal. Committees will:
    - Align resources with ambition and ensure sustainable implementation:
      - Assess alignment with Cogence’s mission, resource requirements, and long-term value
      - Evaluate operational budgets or endowment opportunities
      - Identify required volunteer and staff capacity. Identify lead and backup individuals for each major initiative.
      - Recommend funding and partnership strategies
    - Leverage Organizational Learning:  
Research and incorporate lessons learned from previous program launches and market expansion efforts.
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## Action Plan Framework

Execution will occur in phased stages with detailed annual work plans developed by committees and approved by the National Board:

- 2026: Planning, feasibility analysis, funding strategies, and committee formation
  - Focus on Town Hall to maximize industry-wide exposure, brand recognition, owner engagement, and financial success
  - Define Cogence Way and develop related deliverable
  - Enhance and grow the Emerging Leaders program
  - Assess the feasibility and local support for a new chapter in Pittsburgh or Indianapolis
- 2027: Launch of scholarship program; pilot or decision on competition
  - Award inaugural Cogence scholarships in all three chapter regions
  - Decide on whether to implement student competition (potentially at the 2028 Town Hall) and proceed accordingly with task force
  - Decide on whether to launch a new chapter and proceed accordingly with task force
  - Start Emerging Leaders program in Southwest chapter
  - Formalize a recognition or informal certification program to spread awareness and recognize companies for implementing The Cogence Way.
- 2028: Evaluation, refinement, and execution of approved growth initiatives
  - Focus on highly successful Town Hall
  - Launch student competition if deemed feasible
  - Formally launch new chapter if supported by local community

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## Governance, Monitoring, and Evaluation

- The Executive Director will coordinate execution and provide progress reports to the National Board.
- The National Board will provide strategic guidance and approve course corrections as needed. The Board is responsible for ensuring:
  - Program participation and engagement
  - Financial sustainability of initiatives
  - Cross-chapter consistency and collaboration
  - Alignment with mission and strategic priorities

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## Conclusion

This Strategic Plan positions Cogence Alliance to strengthen its foundation while expanding its influence in a deliberate, mission-aligned manner. By prioritizing education, talent development, organizational recognition and disciplined growth, Cogence will continue to shape meaningful dialogue and improve project outcomes across the design and construction industry.