

Session A5:: Strategic Planning



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PURPOSE FOR STRATEGIC PLANNING

- Envision the future in 3-5 years and invest in creating it
- Develop a shared framework for progress
- Provide continuity for leadership direction
- Guide for decisions on projects, programs, and initiatives



THE STRATEGIC PLANNING PROCESS |

PRE-RETREAT

- Member Needs Assessment (optional)
- Stakeholder Interviews (optional)
 - Key leaders and staff team
 - Others closely aligned with the component
- Retreat planning – specifics and logistics
- Agenda preparation

THE STRATEGIC PLANNING PROCESS |

THE RETREAT

- Recommend 1.5 days (evening plus full day)
- Perhaps use outside (objective) facilitator
- Include informal/social event – an opportunity for leadership to bond with one another
- Select a retreat location if/as affordable
- Facilitator uses tools and techniques to optimize outcomes



THE RETREAT | FACILITATOR-OPTIMIZED OUTCOMES

- Retreat should have its own goals
- Agenda moves through a process to shape goals, strategies, and tactics
- Creative exercises stimulate thinking and input
- ALL voices are included (even the introverts!)
- This is NOT where the Strategic Plan is written!



THE STRATEGIC PLANNING PROCESS |

POST-RETREAT

- Facilitator (typically) synthesizes outcomes and drafts the Strategic Plan
- Leadership reviews the plan together and offers refinements
- Board formally adopts Strategic Plan
- Determine need for Implementation – Action – Work Plan
- Determine need for Operational Plan

Plan Makers

~~Plan Breakers~~
Facilitator

Plan Array



Goals	Strategies	Tactics	Assigned to	Staff	2022			2023			2024					
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
1. EMPOWER OUR MEMBERS	Offer member-centric support and service, continue demonstrating the value of membership by equipping members to succeed	1. Ensure that the experience of the association's activities, services and events is a positive one for all members and guests	Staff - Membership, DEI, IT	AY												
		2. Engage members in the association's activities, services and events to support the overall mission	Staff - Members, DEI, IT	BY												
B. Continuity	1. Engage members in the association's activities, services and events to support the overall mission	1. Engage members in the association's activities, services and events to support the overall mission	Staff - Communications, DEI, IT	AY												
		2. Engage members in the association's activities, services and events to support the overall mission	Staff - Communications, DEI, IT	BY												
2. CHAMPION THE PROFESSION	Increase the visibility of architects in the marketplace and promote the profession's value to the public	1. Increase the visibility of architects in the marketplace and promote the profession's value to the public	Staff - Members, DEI, IT	BY												
		2. Increase the visibility of architects in the marketplace and promote the profession's value to the public	Staff - Members, DEI, IT	BY												
3. DELIVER SPECIAL PROGRAMS	Provide professional development for members and the public through educational programs, seminars, and conferences	1. Provide professional development for members and the public through educational programs, seminars, and conferences	Staff - Members, DEI, IT	BY												
		2. Provide professional development for members and the public through educational programs, seminars, and conferences	Staff - Members, DEI, IT	BY												
4. THRIVE AS AN ORGANIZATION	Increase the financial health and sustainability of the association	1. Increase the financial health and sustainability of the association	Staff - Members, DEI, IT	BY												
		2. Increase the financial health and sustainability of the association	Staff - Members, DEI, IT	BY												

'Placemat'



2022-24 Strategic Plan *At-A-Glance*

Mission

Empowered by members to champion the profession of architecture.

All of the goals, strategies, and tactics of the Strategic Plan are intended to refine the focus of AIA Illinois by:

- Advancing the mission of AIA Illinois in serving and supporting its members;
- Championing the profession of architecture as empowered by its members; and
- Demonstrating the organization's commitment to members in all of its actions.

GOAL 1 Empower Our Members

Offer member-centric support and service, continually demonstrating the value of membership by equipping members to succeed.

- Equity and Inclusion** – Broaden the representation of and engagement from members across the diverse range of ethnicity, gender, career stage, practice setting, and location.
- Communications** – Keep members informed on key issues and topics through curated content delivered across a variety of media and platforms.
- Emerging Professionals** – Increase the involvement and engagement of emerging professionals by serving as their leadership development 'go-to' and guide.

GOAL 2 Champion the Profession

Serve as the unified voice of architects in policy arenas and public forums, advocating for issues of importance to the profession.

- Advocacy** – Recognizing that advocacy encompasses more than just legislative and regulatory affairs, advocate for healthy, just, and equitable communities for all.
- Public Outreach** – Tell the story of architects and architecture externally so the greater public better understands our value in contributing to societal well-being.
- Pathway Development** – Educate and inspire youth, especially those from minority groups and communities, to pursue the profession of architecture.

GOAL 3 Deliver Special Programs

Provide professional development for members at all levels through relevant content, networking opportunities, resources, and connections.

- Membership Programs** – Create a 'single AIA' experience for members of the AIA within Illinois, promoting the regional connection among local components and members.
- EP Programs** – Provide meaningful and compelling touchpoints for emerging professionals, including students, associate members, and young architects.
- Revisit Programs** – Develop programming that not only serves the professional needs of members but also demonstrates architects' commitment to improving communities.

GOAL 4 Thrive as an Organization

Drive the daily leadership and management of AIA Illinois to be a model of efficient and effective organizational culture.

- Unified Efforts** – Build greater internal and external coalitions to benefit members by seeking, strategizing, and collaborating with complementary organizations.
- Solid Financials** – Conduct business through sound monetary and fiscal practices, focusing on revenue development and budget adherence to maintain financial goals.
- Vibrant Operations** – Assure that AIA Illinois functions optimally on behalf of its members, maintaining flexibility and adaptability and demonstrating organizational resilience.

'Dashboard'

Goals / Strategies / Tactics		Tasks	TF/Comm	Staff	2022 - 23				
					Q1	Q2	Q3	Q4	Q1
1. EMPOWER OUR MEMBERS – Offer member-centric support and service, continually demonstrating the value of membership by equipping members to succeed.									
A. Equity and Inclusion – Broaden the representation of and engagement from members across the diverse range of ethnicity, gender, career stage, practice setting, and location.									
	1. Ensure that the profession and the organization are attractive, appealing, and accessible to traditionally underrepresented individuals and groups.	1 - Distribute coloring book / 2 - Scavenger hunts / 3 - Architecture month recognition / 4 - JEDI TF See 2.C for initiatives related to the profession		AM		Q2	Q3		
B. Communications – Keep members informed on key issues and topics through curated content delivered across a variety of media and platforms.									
	2. Elevate member awareness of key environmental, social, and economic issues confronting citizens in the state and explain why these are important advocacy topics.	1 - Eblasts / 2 -Programming (annual conf)		Communications	AM	Q1			
C. Emerging Professionals – Increase the involvement and engagement of emerging professionals by serving as their leadership development 'go-to' and guide.									
	1. Advocate for firms to sponsor and support membership for emerging professionals, including associate members and young architects who want to be involved.	1 - Investment letter stating why the firm benefits from EP's being involved in AIA (IL/Local?National) / 2 - Survey firms - see if financially support EP's		BoD TF	EK		Q2	Q3	
	2. Develop & continue to refine a stepped mentorship program for early career through senior-level professionals, similar to the 'Mentoring Family' program.	1 - Check w/ AIA Chicago - Mentor Program, Bridge, etc / 2 - Work w/ Todd H on his ideas / 3 - Check w/ EP's on what they see as important		BoD TF	EK				Q4
2. CHAMPION THE PROFESSION – Serve as the unified voice of architects in policy arenas and public forums, advocating for issues of importance to the profession.									
A. Advocacy – Recognizing that advocacy encompasses more than just legislative and regulatory affairs, advocate for healthy, just, and equitable communities for all.									
	1. Working with other AIA components, develop a 'Regional Statement' format for crucial issues, such as climate action, to guide policy support and legislative direction.	1 - Outreach to Execs / 2 - Demonstrate local benefits of Legislation / 3 - Identify Regional Champions on climate action		BoD TF	SP	Q1	Q2		
	3. To expand advocacy efforts, create a formal 'Advocacy Development Plan' that includes a multi-year budget and schedule.	1 - Dashboard for Board (ongoing) / 2 - Include targeted advocacy strategy (for immediate year and short term efforts) with an annual prelim budget; the plan is reported out on a quarterly basis as to tracking against prelim plan/budget, and update is available online for member reference / inquiries		ExComm	SP	Q1	Q2	Q3	Q4
B. Public Outreach – Tell the story of architects and architecture externally so the greater public better understands our value in contributing to societal well-being.									
	1. Inform the citizens of Illinois regarding livability issues where architects lead positive transformation such as climate change, racial justice, & social equity.	1 - Media/OpEds / 2 - Speaker Engagements / 3 - Press Conf / 4 - Event Attendance		Communications	AM				Q4 Q1
C. Pathway Development – Educate and inspire youth, especially those from minority groups and communities, to pursue the profession of architecture.									
	1. Increase intentional engagement with accredited architecture programs, pre-professional programs, community college programs, and K-12 schools throughout Illinois.	1 - B & G Club sessions / 2 - Visit AIAS chapter meetings / 3 - Better communication w/ NCARB / 4 - Distribute coloring books - for \$ & for publicity / 5 - Speaking opps / 6 - Media opps		JEDI	MY				Q4 Q1
3. DELIVER SPECIAL PROGRAMS – Provide professional development for members at all levels through relevant content, networking opportunities, resources, and connections.									
A. Membership Programs – Create a 'single AIA' experience for members of the AIA within Illinois, promoting the regional connection among local components and members.									
B. EP Programs – Provide meaningful and compelling touchpoints for emerging professionals, including students, associate members, and young architects.									
C. Revisit Programs – Develop programing that not only serves the professional needs of members but also demonstrates architects' commitment to improving communities.									
4. THRIVE AS AN ORGANIZATION – Drive the daily leadership and management of AIA Illinois to be a model of efficient and effective organizational culture.									
A. Unified Efforts – Build greater internal and external coalitions to benefit members by seeking, strategizing, and collaborating with complementary organizations.									
	2. Leverage external alliances with related professional societies and strategic industry partners for the benefit of the organization and its members.	1 - Meet w/ other ED's / 2 - Increase Interaction w/ other industries - presentations, etc. / 4 - Identify industry partners / 5 - Include a board member from an allied organization?		Internal	SP			Q3	Q4
B. Solid Financials – Conduct business through sound monetary and fiscal practices, focusing on revenue development and budget adherence to maintain financial goals.									
	1. Harness the power of the virtual world to grow the number of members, in addition to membership development strategies emphasizing relevancy.	1 - Coffee talks-updates		Internal	EK	Q1			
	2. Persistently investigate non-dues revenue development, including for the IAPAC and Foundation, through strategic alliances, program sponsorship, and creative fund-raising.	1 - Sponsorships / 2 - Find Donors		Internal	SP				Q4 Q1
C. Vibrant Operations – Assure that AIA Illinois functions optimally on behalf of its members, maintaining flexibility and adaptability and demonstrating organizational resilience.									
	1. Govern through a model that promotes effective leadership development, preparation, and service, and encourages mutually supportive board and staff relationships.	1 - Create list of possible future Board Members / 2 - Push Board and Chapter Presidents to actively recruit new leadership / 3 - Use volunteers time wisely / 4 - Look at ways to educate excomm better-match up staff w/ specific position / 5 - Conduct basic orientation & orientation updates for full board & staff		Internal	SP	Q1	Q2	Q3	Q4
	2. Nurture a staff/office climate that is constructive for all team members, empathetic to individual needs, and professionally rewarding for each person.	1 - Support current staff / 2 - Continue to adapt and grow w/ new operation options		Internal	EK	Q2			

GENERAL GOAL FRAMEWORK FOR THE STRATEGIC PLAN

National AIA

Goals::

Climate Action
Equity

Strategies::

Mobilize for Impact
Educate and Prepare
Advance Knowledge
Broaden the Tent

Statewide Component

Goals::

Member Care
Advocacy/Outreach
Knowledge Delivery
Governance/Operations

Strategies::

TBD

Local Component

Goals::

Member Care
Programs
Public Outreach
Governance/Operations

Strategies::

TBD

GENERAL FRAMEWORK FOR STRATEGIC PLAN

- Include component's mission, vision, and purpose (core values) early
- Each Goal includes a statement
- Each Strategy (or Objective) includes a statement
- Each Tactic includes a statement
- Keep goals, strategies, and tactics manageable for size of chapter
- Any metrics are in the context of strategies and tactics
- Action verbs are part of this document!

SOCIALIZING (OR OPERATIONALIZING) THE STRATEGIC PLAN

- Ensure the plan does NOT ‘sit on a shelf’
- Consider creating a ‘one-pager’ (‘placemat’) with mission/vision/goals/strategies
- Include the Strategic Plan in every board meeting:
 - ‘Mission Moment’ at beginning of meeting
 - Focus on one goal each meeting
 - Arrange agenda items by goal areas
 - Check-in on progress (dashboard or similar tool)

KEY TAKEAWAYS FROM YOUR PROCESS

- The process is an opportunity for your leadership to coalesce in shaping the future.
- Keep the plan manageable to suit the size of your component.
- The plan provides a framework for decision-making down the road.
- Socialize the plan so it becomes part of your routine governance and operations.
- Show off your Strategic Plan ... Be proud of your work and your direction!



Comment and concerns?
Questions or curiosities?

Thank you!

Happy planning!!!