

Eric Klinner, CAE
Managing Director, AIA Illinois

Helene Combs Dreiling, FAIA
President | The Three Aspens, Ltd.

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

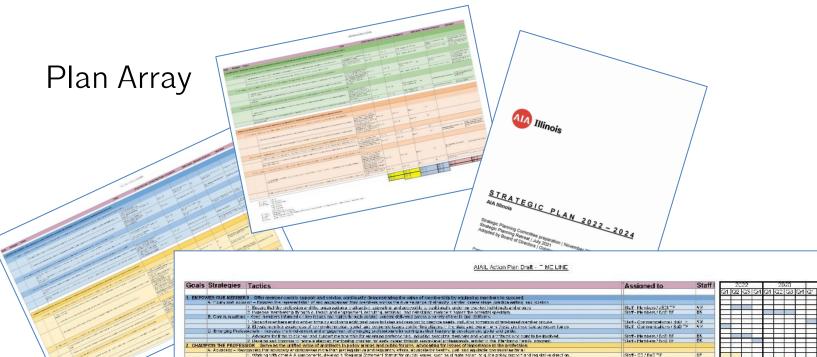
- Facilitator (typically) synthesizes outcomes and drafts the Strategic Plan
- Leadership reviews the plan together and offers refinements
- Board formally adopts Strategic Plan
- Determine need for Implementation Action Work Plan
- Determine need for Operational Plan



Plan Makers

Plan Hiteakers





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		2. Ingresse the skibility of the profession and its tractioners by tighting more detailed information about members and their profession.	Siaff - Communications / 3xD TF	AW								П
	C. Fathway Develo	ement – Educate and linspire wouth, except ally those from million types and communities, to purely line profession of anotherwise								\Box	$\overline{}$	Т
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	A SHEET SERVICE	 Strengthen the relationship with practices of the American maid, to of Architecture Students (NAS) across the state's universities and colleges. 	Staff: Membership (JED)	FK				- 3		\top		Т
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	A. Merribership Pro	grams - Create a single AIA experience for members of the AIA within Timple, promoting the regional connection a hong local components and members.										7
	The state of the s	1. Corrected the formation of more state-centric Knowledge Corring ties to enhance the programmable and herwite and expensance of members.	Matt - Programs / ScD 11:	WY				- 53	8 3			4
		2. Refine programs for individual hours and profest design awards to align with the early values of the profession and organization.	Staff Programs / BoD TF	MY	2			- 3		28.3	-32	I
	B. EP Roganny	Provide meaningful and comparing touchpoints for energing molessionals, including absolute lasteness, and young architects.		1						\top		Т
		 Condition or entrance the user experience within well-known and blank suppossible existing EP programs such as AtASp re. the EP Network the EP Summit, and others. 	Slaff - Programs / ScP TF	WY		\equiv						_
	Designation of the last of the	2. Six solutiones: expeciations, and expressions from emerging confessions in order to cheat terpeted programmal commit for this work member constitutory.	Staff - Programs / SoD 11:	WY		=		- 20				_
	C. Bereit Program	 Ferwice programing that not only serves the professional needs of members for a suider confirmer, and ledit commitment to improving communities. 		1800			001					_
	200200000000000000000000000000000000000	11. Restore and refresh the mence ship retwork no and professional development experient also effered through the Annual Conference, including a partie component.	Staff Programs / Annual Conf. TF	WY								
		2. Explore the productive of a Great Lases Rectional Network, incorporating members across the upper Microsoft to collaborate on societa to focuse; and other productives.	Staff - Programs / ScD TF	SF	15		100	100				_
I. THRIVE		ATION - Drive the daily leadership and management of AIA Illinois to be a model of efficient and effective organizational eultrue.							0 0		_	_
	A. United Efforts -	Suits greater internal and external could not be tereformen bers by seelid to istrated ating, and collaborating with complementary or; anisotrons.			\vdash	-			4	_	_	_
		1. Outinize the robit of white beat components to serve members with efficiency and effectiveness, reducing contain and education of effort.	Pland	FK	\vdash	-	_	\vdash			_	4
		2. Leverage external at ances with related professional societies and strategic industry partners for the benefit of the ordanization and its metribers.	Slaff : ED	2F	\vdash			\vdash		\rightarrow	_	4
	B. Stat: Principals	Conductings a triangly abound interpolarly and focal practices, focusing an inversed person and budget adherence to maintain financial goals.	The second secon	200			_	\rightarrow		\rightarrow	_	4
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	C. Othern Operate	ne - Assure that AIA. Ence furst one opposity on senal of nemembers maintaining fleibility and especialists and semonateding organizations markense.		0.00	\vdash	\rightarrow	_	_	+	+	_	4
		Govern through a model that promotes effective leaders to be velopment preparation, and centice, and encourages rursually supportive board and staff relationships.	Internal	SP				-	+	+	-	4
		2. Murture a varification clamate that is construction to a Heart members, empethelic to incredual needs, and professionally revending for each parameter.	I-ternst	E.C.	-						_	_



'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.
- B. Communications Keep members informed on key issues and topics through curated content delivered across a variety of media and platforms.
- C. 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.

- A. Advocacy Recognizing that advocacy encompasses more than just legislative and regulatory affairs, advocate for healthy, just, and equitable communities for all.
- 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.
- C. 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.

- Momborship 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.

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.
- B. Solid Financials Conduct business through sound monetary and fiscal practices, focusing on revenue development and budget adherence to maintain financial goals.
- C. Vibrant Operations Assure that AIA Illinois functions optimally on behalf of its members, maintaining flexibility and adaptability and demonstrating organizational resilience.



'Dashboard'

Goal	s / Strategies / Tactics	Tasks	TF/Comm	AM Q1	- 2			
					Q1	020	23 C	240
EMP	OWER OUR MEMBERS - Offer member-centric support and service, conti	nually demonstrating the value of membership by equipping members to succeed.			П	\top	Т	Т
A. E	guity and Inclusion - Broaden the representation of and engagement from mem	bers across the diverse range of ethnicity, gender, career stage, practice setting, and location	on.		П	十		T
1	I. Ensure that the profession and the organization are attractive, appealing, and	1 - Distribute coloring book / 2 - Scavenger hunts / 3 - Architecutre month recognition / 4 -	JEDI TF	ΔΝΑ	Н			†
	accessible to traditionally underrepresented individuals and groups.	See 2.C for initiatives related to the profession		7 divi	\vdash	Q46	13	4
B. C	ommunications – Keep members informed on key issues and topics through cu	rated content delivered across a variety of media and platforms.						
	2. Elevate member awareness of key environmental, social, and economic		Communications			Т	Т	Т
	ssues confronting citizens in the state and explain why these are important advocacy topics.	1 - Eblasts / 2 -Programming (annual conf)		AM	Q1			
C. E	merging Professionals – Increase the involvement and engagement of emergin	g professionals by serving as their leadership development 'go-to' and guide.				\top		T
1	Advocate for firms to sponsor and support membership for emerging	1 - Investment letter stating why the firm benefits from EP's being involved in AIA	BoD TF		П			T
	professionals, including associate members and young architects who want to be involved.	(IL/Local?National) / 2 - Survey firms - see if financially support EP's		EK		020	23	
	2. Develop & continue to refine a stepped mentorship program for early career	1 - Check w/ AIA Chicago - Mentor Program, Bridge, etc. / 2 - Work w/ Todd H on his	BoD TF		П	\top		7
ti	hrough senior-level professionals, similar to the "Mentoring Family" program.	ideas / 3 - Check w/ EP's on what they see as important		EK	Ш		C	24
CHA	MPION THE PROFESSION - Serve as the unified voice of architects in pol	icy arenas and public forums, advocating for issues of importance to the profession.			П	\top		٦
A. A	dvocacy - Recognizing that advocacy encompasses more than just legislative	and regulatory affairs, advocate for healthy, just, and equitable communities for all.				\Box		
	1. Working with other AIA components, develop a 'Regional Statement' format	1 - Outreach to Execs / 2 - Demonstrate local benefits of Legislation / 3 - Identify Regional	BoD TF				Т	_
	or crucial issues, such as climate action, to guide policy support and legislative	Champions on climate action		SP	Q1	02	Т	
	direction. 3. To expand advocacy efforts, create a formal 'Advocacy Development Plan'	1 - Dashboard for Board (ongoing) / 2 - Include targeted advovacy strategy (for	ExComm		\blacksquare			-
	hat includes a multi-year budget and schedule.	immediate year and short term efforts) with an annual prelim budget; the plan is reported		CD.			П	
		out on a quarterly basis as to tracking against prelim plan/budget, and update is available		3P	_			
		online for member reference / inquires			Q1	Q2C)3 C	24
	ublic Outreach - Tell the story of architects and architecture externally so the gr	reater public better understands our value in contributing to societal well-being.			Ш	\perp		
	 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			0	7/
	athway Development – Educate and inspire youth, especially those from minori	ty groups and communities to pursue the profession of architecture			\vdash	+	-	-
-	Increase intentional engagement with accredited architecture programs, pre-	1 - B & G Club sessions / 2 - Visit AIAS chapter meetings / 3 - Better communication w/	IEDI		Н	+	+	_
	professional programs, community college programs, and K-12 schools	NCARB / 4 - Distribute coloring books - for \$ & for publicity / 5 - Speaking opps / 6 -	JEDI	MY	ll			
	broughout Illinois	Media opps			ll		C	24
		ers at all levels through relevant content, networking opportunities, resources, and co	onnections.		П	\top	Т	1
A. M	lembership Programs – Create a 'single AIA' experience for members of the AIA	A within Illinois, promoting the regional connection among local components and members.			Н	+	+	-
	P Programs - Provide meaningful and compelling touchpoints for emerging pro				\vdash	-	+	_
C. R	evisit Programs - Develop programing that not only serves the professional ne	eds of members but also demonstrates architects' commitment to improving communities.			\Box	\neg		_
THRI	VE AS AN ORGANIZATION - Drive the daily leadership and management	of AIA Illinois to be a model of efficient and effective organizational culture.			П	\top		_
A. U	nified Efforts - Build greater internal and external coalitions to benefit members	by seeking, strategizing, and collaborating with complementary organizations.			П	\neg	\top	_
	2. Leverage external alliances with related professional societies and strategic	1 - Meet w/ other ED's / 2 - Increase Interaction w/ other industries - presentations, etc. / 4	Internal	CD.	П	\neg	3 5	Т
i	ndustry partners for the benefit of the organization and its members.	- Identify industry partners / 5 - Include a board member from an allied organization?	(Become)	SP		C	23 C	2
B. S	olid Financials - Conduct business through sound monetary and fiscal practice	s, focusing on revenue development and budget adherence to maintain financial goals.			П	\top	Т	
1	Harness the power of the virtual world to grow the number of members, in	1 - Coffee talks-updates	Internal	EK		Т	Т	7
	addition to membership development strategies emphasizing relevancy.			LIX	Q1	+	4	_
	2. Persistently investigate non-dues revenue development, including for the	1 - Sponsorships / 2 - Find Donors	Internal	cn.	ll			
	APAC and Foundation, through strategic alliances, program sponsorship, and creative fund-raising.			OF.	ΙI		C	2
		nembers, maintaining flexibility and adaptability and demonstrating organizational resilience.			Н	+	Ť	Ì
-	Govern through a model that promotes effective leadership development,	1 - Create list of possible future Board Members / 2 - Push Board and Chapter Presidents	Internal			+	1	-
	preparation, and service, and encourages mutually supportive board and staff	to actively recruit new leadership / 3 - Use volunteers time wisely / 4 - Look at ways to		SP				
	relationships.	educate excomm better-match up staff w/ specific position / 5 - Conduct basic orientation		34				
		& orientation undates for full hoard & staff			Q1	Q2C)3 C	24
100	2. Nurture a staff/office climate that is constructive for all team members,	1 - Support current staff / 2 - Continue to adapt and grow w/ new operation options	Internal	EK			T	
€	empathetic to individual needs, and professionally rewarding for each person.			-10	ш	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!







Thank you!

Happy planning!!!