



Strategic Planning & Managing Expansion

ACE All Affiliates Meeting, Chicago
Monday, June 23

10:45AM to 11:45AM



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Agenda

1. Introduction to Principles of Strategic Planning
Olive Ho, ACE SF Bay Area
2. ACE San Francisco Bay Area Model
Olive Ho, ACE SF Bay Area



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**Vision without
action is
daydream.
Action without
vision is
nightmare.**

QuotesEmpire.com



Strategic Planning Overview Topics

- What is a strategic plan?
- Benefits
- Overall process
- Assess what is right for your organization
- Take away



Why a Strategic Plan?

- A roadmap to guide the organization.
- Typically addresses these questions:
 - Where we want to be in the future?
 - How should we get there?
 - What are action plans?





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Benefits of Strategic Planning

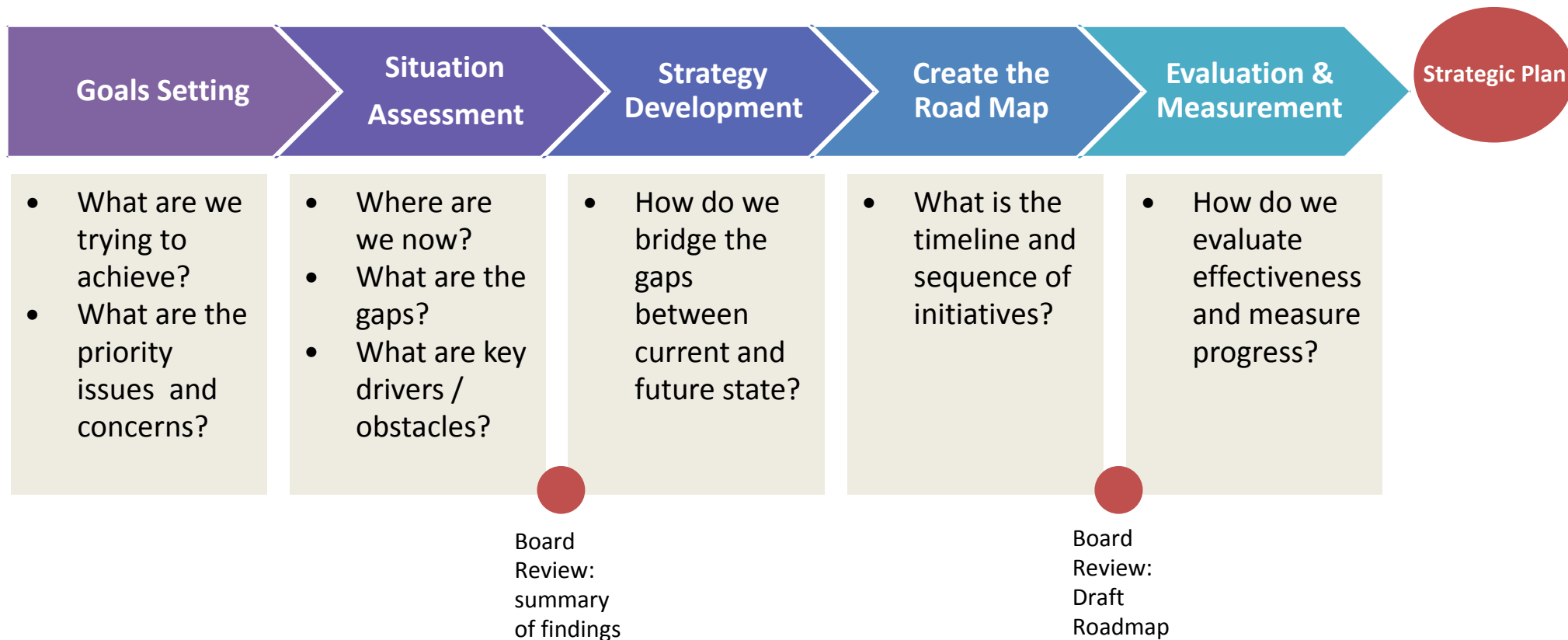
- Align organizational goals.
- Guide decision-making in allocating resources.
- Communicate a clear direction to constituents.





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Process Example





Assess what is right for your affiliate

- Focus and desirable outcome of the process
 - Solving current challenges or issues
 - Inspiration goals
- Available resources and past experience
 - In-house experienced facilitator
 - External consultant
- Stakeholder engagement
 - Who and level of engagement
- Time commitment
- Level of effort



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Take Away

- Process is as important as the end product
- Develop some ground rules of engagement
- Measurement is key to tracking progress
- Communicate the goals and consistently reinforce the message
- Plan for people's resistance to change
- Strategic plan is a living document, it needs to be revisited



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ALL AFFILIATES MEETING JUNE 22 AND 23, 2014

San Francisco Bay Area





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Background

- The SF Affiliate has established for about 10 years
- Has grown up, but have some growing pains
- 2013-14 students completed the program = 226
- Current mentors/volunteers: ~ 160
- Large area of coverage: 9 counties



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The Challenge

- Experience mentors and volunteers attrition due to 'burned out'
- Not sufficient new pool of volunteers to support program activities
- Want to tackle many things, but everyone was 'spreading thin'





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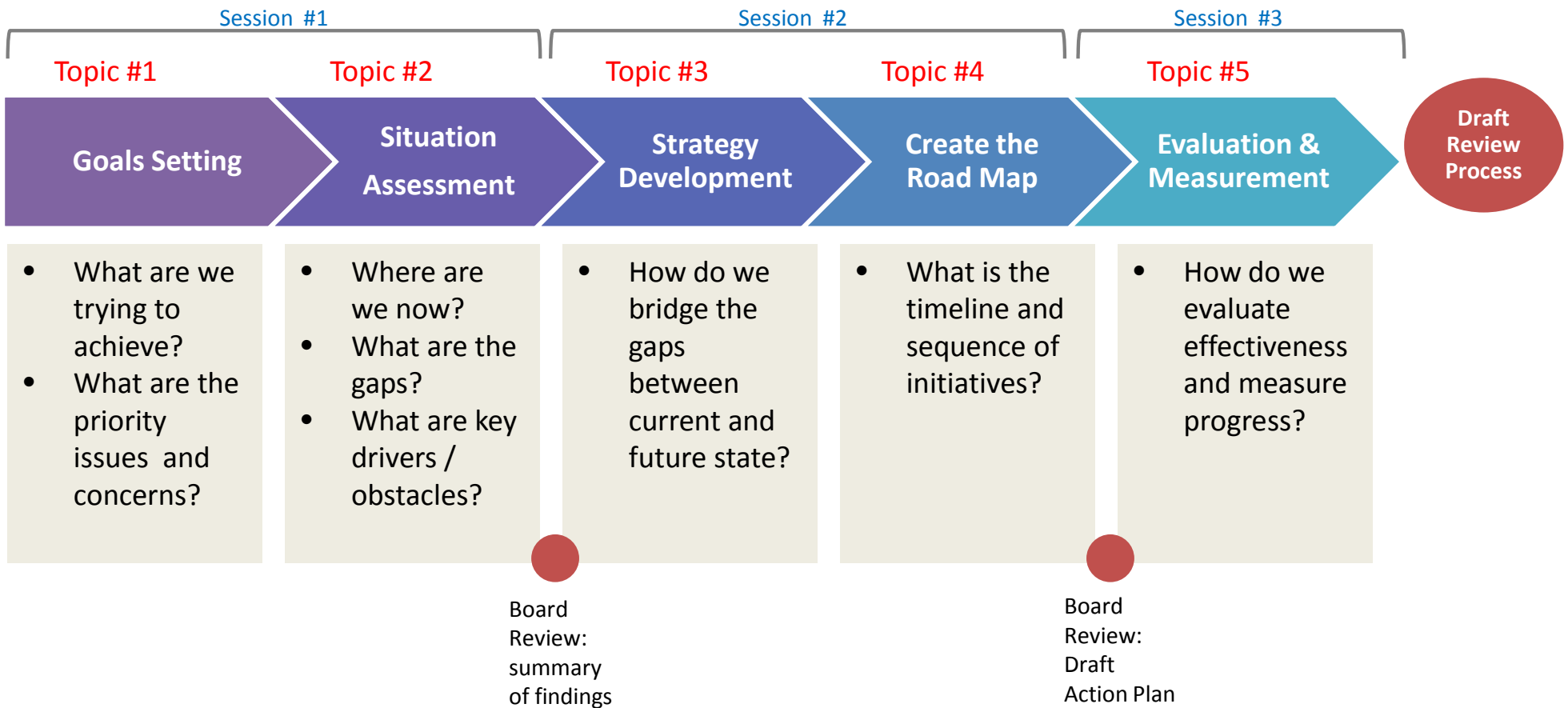
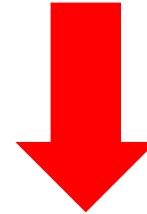
Process

- In-house facilitator proposed a planning process
- Obtain board members agreement and commitment
- Board members completed a pre-session questionnaire
- Conducted research and collected historical data
- Completed two work sessions to date



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Where We Are





One of the National ACE Mentor Goals is...

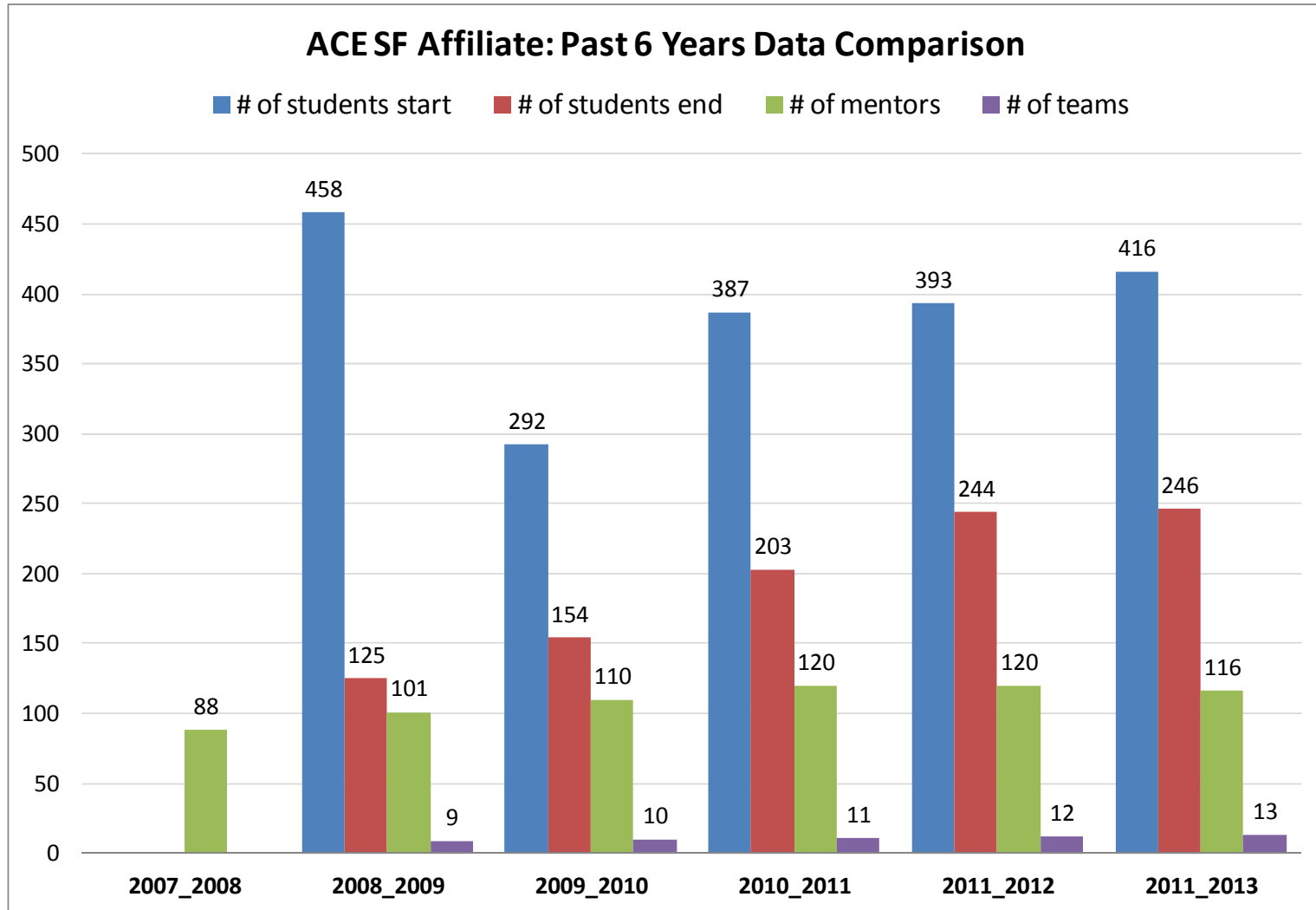
“Our strategic plan calls for each of our affiliates to seek to attract 1% of the high school students in its designated affiliate to your program by 2015.”

Letter from Chairman, ACE National Governance Committee



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What is the past and current benchmarks?

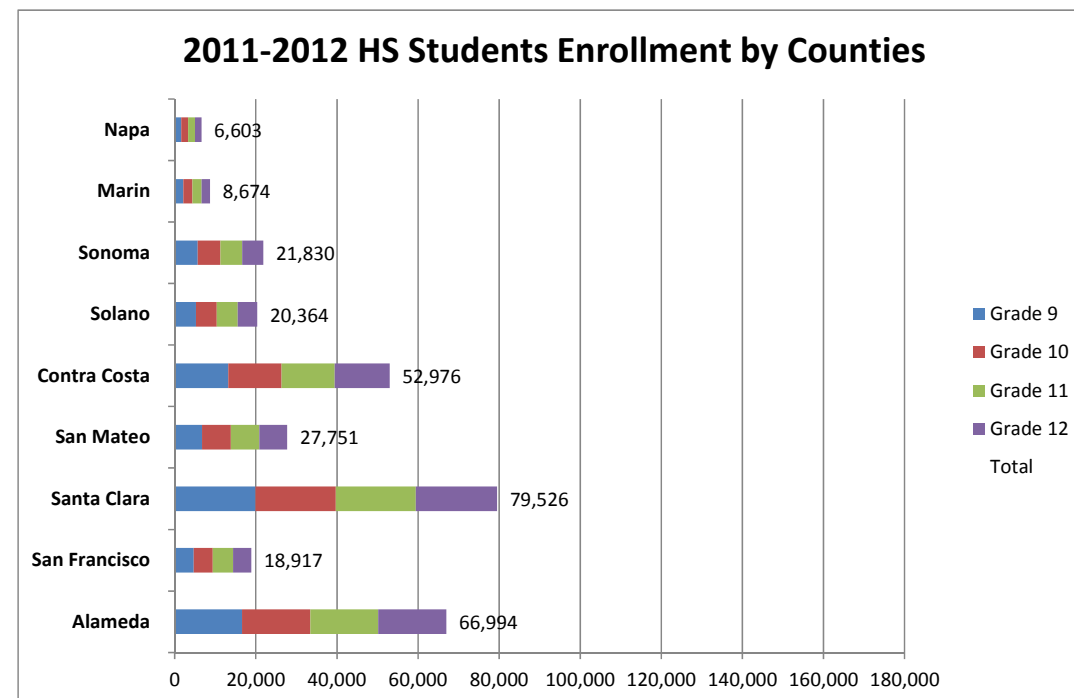




How Big is the Target Market?

- Research the market using public records
- High School Students Enrollment in 9 SF Bay Area Counties = **approx. 300,000**

1% = 3,000 students





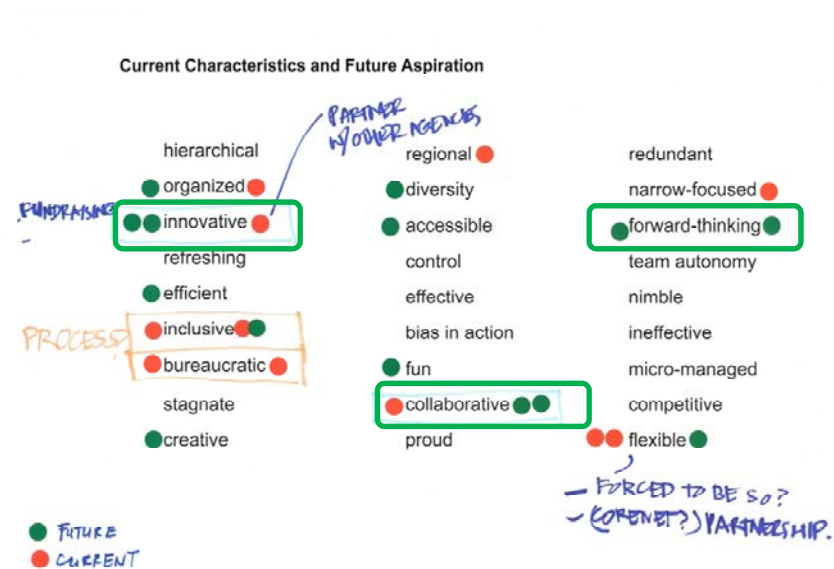
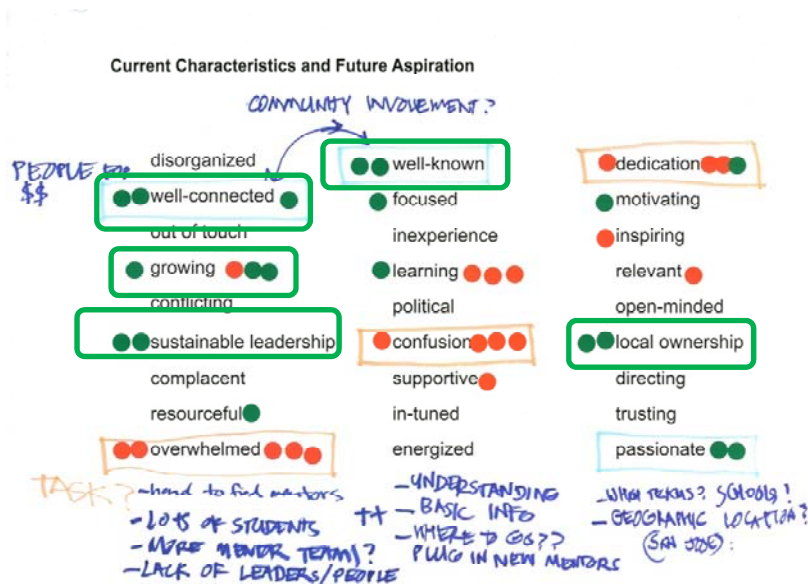
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Current

- Overwhelmed
too many things to do and too few volunteers
- Dedication
people are passionate about our program
- Learning/confusion
need more communication and common understanding of the process

Future

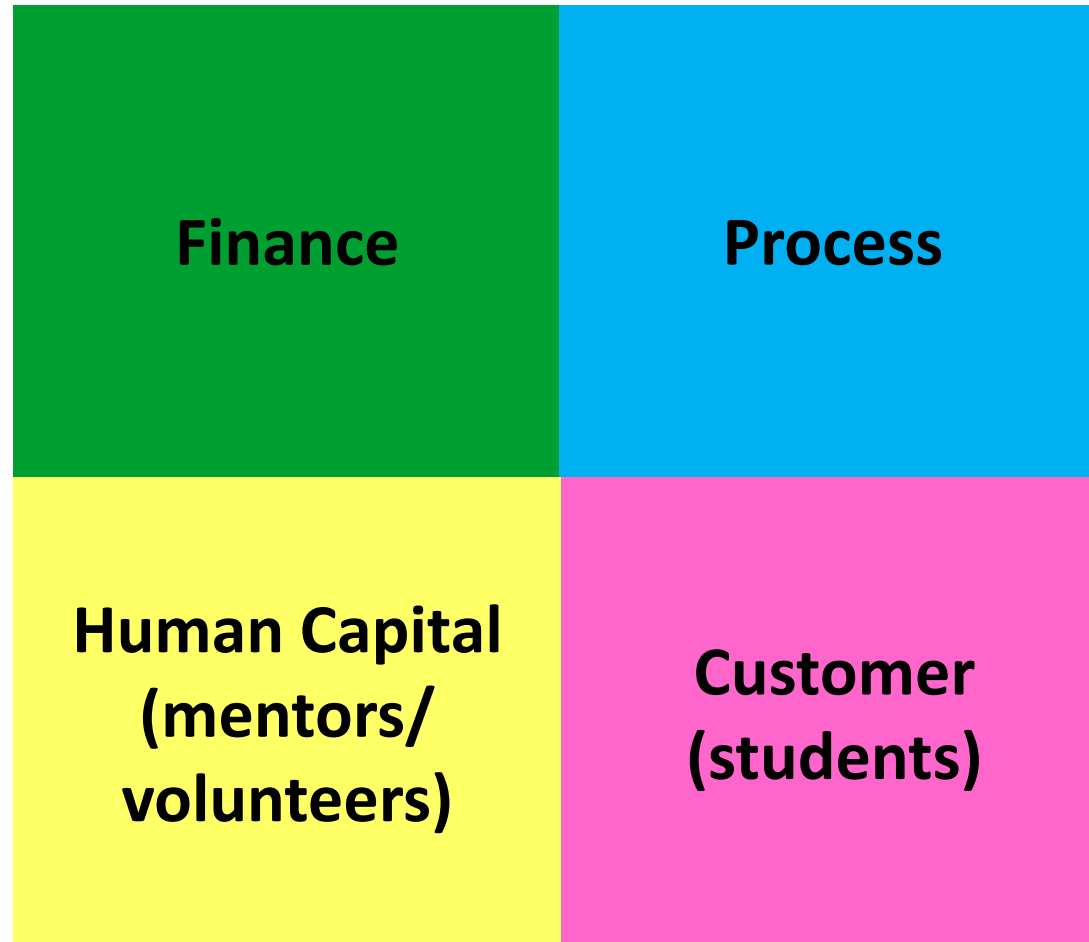
- Well-connected/well-known
ability to attract more support and sponsorship
- Innovative/forward thinking
creative in using available resources to achieve the most impact for our mission
- Growing/sustainable leadership
grow more leaders to expand the program
- Local ownership/collaborative
better serve and tie-in with the local community and yet collaborative across the organization





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Balanced Scorecard





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Balanced Scorecard: Goal Setting - continued

Human Capital (mentors /staff/volunteers)

Volunteers Recruitment and Empowerment - Expand volunteers base

- Don't burn out – have enough volunteers
 - Work with students
 - Administrative side
- Increase mentors numbers through outreach locally
 - Encourage varying experiences in ACE, take on different roles
 - Increase volunteer involvement in committees

Mentor retention and incentive

- Increase opportunities for mentor education opportunities (guest speakers on special topics of interest, etc.)
- Increase opportunities for mentors to network and share their experience with each other
- Increase mentor and mentor firm recognition/publicity
 - Increase recognition of mentors' contribution to the participating ACE companies as an incentive for additional employees to get involved and stay involved in ACE.

Develop a Leadership succession plan

- Generate involvement from "Junior mentors", those pursuing degrees in ACE fields
- Recruit and develop mentors to be future team leaders.
- Develop team leaders to be future board members.
- Develop mentors to be future leaders of the ACE Mentor organization

Raise Awareness of ACE

- Increase presence and awareness of the ACE program among the construction / business community. Intent is to increase program opportunities, locate funding sources, identify new board members, etc.

OUTSIDE INDUSTRY

(EDUCATE) INVOLVE STUDENTS / PARENTS

INVOLVE MORE IN ACE

Process

Organization Structure

- Consider breaking the areas up into smaller geographies and allowing them to manage themselves.

SAME COMPANIES, DIFFERENT POOLS

LOCAL BETTER

EASIER TO SELL, INVOLVE COMMUNITY

Administrative Support - Tool Kit and Database

- Establish standards and guidelines among teams to ensure consistency in program quality and delivery - Administrative
- Create "tool kit" for teams starting up, whether it be physical or electronic materials
- Create clean databases for student/mentor/sponsor/alumni record keeping

Student Recruitment

- Engage leaders at participating ACE high schools and colleges to provide ACE program support in recruiting students, providing facilities, supporting ACE functions, etc.

Program support

- Find way to make technology more available to teams (computers, CAD, Revit) rather than have student hunt down in their spare time or use their own resources
- Promote increased interactivity among ACE teams. Combined programs, site visits, field trips, etc.
- Increase opportunities for teams to share lessons learned with each other

REPORT BACK / INDEPENDANT ?
STRONGER REGION "BREAKS OFF"
CONCENTRATION LACKING.
INVOLVE STUDENTS

- * Communication & Knowledge Sharing
 - effective communication @ all level
 - organizational learning



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Balanced Scorecard: Goal Setting

Customers (Students)

- Increase # of students
- Maintain a student to mentor ratio no more than 1 to 4

Resources and support after the program

- Provide more internship or job shadowing opportunities
- Create local memberships to allow students more face time with leadership
- Promote intern opportunities for ACE Alumni who are pursuing college education in ACE fields of study.
- Provide support to ACE Alumni who are ready to start their career in the ACE industry

1:10
1:6
1:4
1:3
1:1

CUPERTINO
SARATOGA

SF

FUTURE MENTORS?
OR COLLEGE?

LOCAL
GEOGRAPHY
MORE PEOPLE
FROM COMM'

OF STUDENTS / MENTORS

- MANY MENTORS IN SF : 1:1 RATIO.
VICE VERSA IN OTHER AREAS.

- SELF MOTIVATED TEAMS

- IDEAL TERM SIZE ≈ 30

TOO SMALL : DEMOTIVATING
TOO BIG : UNMANAGEABLE

AFTER PROGRAM

- YES, AFTER IS IMPORTANT

- GOOD @ A FEW THINGS

LOCAL MEMBERSHIP

- SANTA CLARA ?

- SPREAD TOO THIN ?

Finance

- Develop a multiple-year financial plan.
- Continue to provide scholarship to students
- Fund raise a minimum of \$50,000 student scholarship per year and aim to increase by 10% each year.
- Fund raise a minimum of \$1,000 student scholarship per year

"LIKE TO HAVE"

INCREASE ENROLLMENT, THEN SCHOLARSHIP

Expand network for funding sources

- Obtain grants
- Establish and implement an approach for identifying, assessing, and preparing grant applications.
- Identify 'repeat' funding sources.

what is the % of student pick up the scholarship
→ what is the real impact!

Earmark funds for activities that enrich students experience with ACE

- Earmark funds for team expenses, CIRT competition entries
- Provide funds for:
 - Field trips
 - Computers for BIM/REVIT
 - Summer camps (limit to 21-22 students)
- Provide funding to allow us to enroll and graduate more students.

- easier to fund raise
- more local
- high ROI

compare the impact!



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SWOT Analysis





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What is Working...

Program delivery:

- Doing a great job serving the students
- Team building and mentoring
- Mentors who have been committed are fully engaged with the students, reflecting in creation of strong mentor/student bonds
- Strong pool of mentors; some teams have multiple candidates for future team leaders
- Giving each team freedom to structure sessions to fit resources available and the interests of the students.

Tenacity and dedication of volunteers & the board

- Dedicated mentors and team captains
- Experienced Board with recent additions of board members who are demonstrated ACE supporters
- Dedication of the board to the mission and the students..

Students and network:

- Good relationship with schools – teachers, counselors, administrators, etc.
- Availability of student population; ability to attract 'repeat' ACE students and new students.
- Enrollment has increase

we have good reputation but still ambiguous

Scholarships

- Scholarship delivery: well organized and has a process in place to determine scholarship distribution and awarded. E.g. has a list of college majors to inform students.

Fundraising:

- Events/Fundraising
- Fundraising has worked, but not effectively

If I could change one thing...

Reorganize into smaller regions and empower the local leadership

- Get each region strong enough to consider dividing areas into independent affiliates. That way, each region can more effectively structure leadership, market, fundraise, outreach to those who have a staked interest in their specific geographic area.
- Break up the geographies to smaller areas with local ownership that could report up to a bigger area

** SJ & Santa Clara can be itself own Region (hard to find mentors)
* Local people dealing w/ local community. /volunteers base retention and expansion -no problem w/s-tudents. (Ed)*

- Initiate some sort of incentive program to acquire and retain (team) leaders and mentors
- We need to expand our base of volunteers:
 - Those that are interested in working with the students should be allowed to concentrate on that. This is the most important part of our mission statement.
 - Need more volunteers to work out the administrative processes that support those that work with the students
 - o fundraising

Leadership Succession

- Develop and implement a multi-year succession plan
- Leadership succession plan – to get things going, avoid burn out factor

tough to find team leader

TEAM LEADERS NEEDED

These items match up with the priorities voting



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Key Issues and Concerns...

Volunteers burn-out factor

- Volunteer burn-out. Imbalance in turnover rate leading to exhausting energies of same people.
- volunteer burn out
- Volunteers burn out and organization becomes stagnate.
- Lack of participation on committees.
- Need new leaders to step up to take ownership and responsibility of various initiatives/tasks.

Lack long term strategy for Leadership development and succession plan

- Succession plan for all volunteers
- Leadership
- Long term board members are susceptible to 'burn-out'. In addition to board participation, many are committee lead, mentors, etc. while working full-time.
- Managed succession at all levels: team leaders, committee leads, board members,
- Leadership succession – all levels (board, team leader); Many people have the same role/responsibility for too many years. Typical team leader life cycle is about 3 years – no plan or established process to cultivate or develop future leaders for succession.

Lack long term financial / funding strategy and bandwidth

- Multi-year financial / funding strategy to avoid need to manage annual 'boom/bust' cycles.
- fund raising programs
- Fundraising – need to have a plan and take a more strategic approach. It should be happening all year round, not just for one or two event.
 - Government, City, small and large firms.

Key Issues and Concerns Continued...

Organization structure and administrative issues

- Getting too large to cover all areas...
 - Geography is too large to manage, has limited local ownership
 - Growing region becoming difficult to manage under one affiliate.
- Lack diversity
 - Wrong # and type of board member. Need folks outside construction and A/E industry who are movers and shakers in the local area. Tier directly to #1.
 - Not enough diversity of firms/organizations that are actively involved – it is mostly a small percent of firms/people that are always actively involved in most of events/activities
- Not enough spreading around the work: need to empower new volunteers to take on tasks or create opportunities for people to rotate responsibilities.
- Need more local partnership that works to help us grow
- Too structured, needs more philanthropic ideas and flexibility

② Communication and knowledge sharing

- Effective communication *— @ all level*
- Organizational learning – don't have a formal process/ forum that allows lessons learned to be shared among teams. How to repeat success from one region to another.

between mentors & students



Goals Examples

Short-term (2013)

- Empower the regions to organize events/activities that have a local community focus
- Expand volunteers/mentors base to take on planning/implementation of program activities
- Develop a leadership succession plan

Midterm (2-3 years)

- Increase mentor retention and incentives with mentor network opportunities and public recognition
- Ensure program consistency with common tool kit, standards and guidelines
- Engage leaders in education to improve student recruitment and support
- Earmark funds for team expenses and activities that enrich students experience with ACE

Long-term (beyond 3 years)

- Provide additional support to students: e.g. internship or job shadowing opportunities, technology training
- Develop a more robust fundraising strategy and network
- Develop a multi-year financial planning



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Accomplishment to Date

- Established goals and priorities (short, medium, and long term)
- Developed strategies to achieve the identified goals