Strategic Planning & Managing Expansion

ACE All Affiliates Meeting, Chicago
Monday, June 23

10:45AM to 11:45AM
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*
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?
Benefits of Strategic Planning

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

**Goals Setting**
- What are we trying to achieve?
- What are the priority issues and concerns?

**Situation Assessment**
- Where are we now?
- What are the gaps?
- What are key drivers / obstacles?

**Strategy Development**
- How do we bridge the gaps between current and future state?

**Create the Road Map**
- What is the timeline and sequence of initiatives?

**Evaluation & Measurement**
- How do we evaluate effectiveness and measure progress?

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Board Review: summary of findings

Board Review: Draft Roadmap

Career Directions for Students in Architecture, Construction and Engineering
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
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
San Francisco Bay Area
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
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'
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
Where We Are

Session #1

Topic #1  Topic #2

Goals Setting  Situation Assessment

• What are we trying to achieve?
• What are the priority issues and concerns?
• Where are we now?
• What are the gaps?
• What are key drivers / obstacles?

Session #2

Topic #3  Topic #4

Strategy Development  Create the Road Map

• How do we bridge the gaps between current and future state?
• What is the timeline and sequence of initiatives?

Session #3

Topic #5

Evaluation & Measurement

• How do we evaluate effectiveness and measure progress?

Board Review: summary of findings

Draft Review Process

Board Review: Draft Action Plan

Career Directions for Students in Architecture, Construction and Engineering
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
What is the past and current benchmarks?

ACE SF Affiliate: Past 6 Years Data Comparison

- # of students start
- # of students end
- # of mentors
- # of teams

<table>
<thead>
<tr>
<th>Year</th>
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<th># of students end</th>
<th># of mentors</th>
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<td>416</td>
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Career Directions for Students in Architecture, Construction and Engineering
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

Data Source: California Department of Education Educational Demographics Unit website
**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
Balanced Scorecard

- Finance
- Process
- Human Capital (mentors/volunteers)
- Customer (students)

Career Directions for Students in Architecture, Construction and Engineering
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
      - Enamour varying experience in ACF, 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' contributions to the participating ACF 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 pursing 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, locates funding sources, identify new board members, etc.
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

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
- 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.
- 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 25-30 students)
    - Provide funding to allow us to enroll and graduate more students.
SWOT Analysis

Career Directions for Students in Architecture, Construction and Engineering
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 increased

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.
- 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
    - fundraising

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

These items match up with the priorities voting
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 stagnant.
- 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 events.
    - 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

Communication and knowledge sharing
- Effective communication at 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
Accomplishment to Date

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