**Strategic Plan Document**
**September 2020**

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# I      Introduction

The American Institute of Architects, St. Louis, (AIA St. Louis) partnered with The Rome Group to launch strategic planning in the fall of 2019.   Working with the Executive Director and a Strategic Planning Committee, (See Appendix A, page 17), The Rome Group facilitated the process that is described below.

Findings of the process' Discovery Phase, including the environmental scan and member survey results also are included in this document as are the goals and objectives of the plan, the strategy screen to be used to help the organization make decisions regarding opportunities, and an action plan template.

The Rome Group appreciated the opportunity to work with AIA St. Louis and thanks the staff and volunteers who provided ideas and insights to inform the strategic planning.

# II      Strategic Planning Process

Following the formation of the Strategic Planning Committee and collection and review of organizational information by The Rome Group, interviews were conducted with Committee members and others to to identify the chapter's strengths, challenges, and opportunities as well as trends that might affect the organization, including the need to increase membership.

The Rome Group also conducted an environmental scan to understand changes in the profession and identify how other AIA chapters are addressing challenges in the field.   In addition, the process included a member survey to gather data about what local architects who have joined AIA perceive as the benefits of membership, what gaps in programs and services for professionals exist that the chapter might fill, and what they see as the most important trends and challenges in the field.

Upon completion of the interviews, scan and survey, The Rome Group presented the findings to the Planning Committee in December 2019 and facilitated a discussion about the implications of the results. The Planning Committee also discussed the agenda for a Board of Directors retreat which was held in February 2020.  Following the retreat, where Board members reviewed the findings presented to the Planning Committee, discussed the strategic questions that arose from the findings, and criteria for the strategy screen, The Rome Group developed three-year goals and objectives.  The Strategic Planning Committee then reviewed these goals and objectives before they were presented to the Board of Directors in April 2020.  Following the Board's review, additional changes were made to finalize the goals and objectives. Finally, The Rome Group prepared an action plan template to use in developing specific steps required to implement the goals and objectives.

## III     Discovery Phase Information and Data

With direction from the Strategic Planning Committee, The Rome Group conducted a process to gather data from stakeholders to inform the planning process. The methodology included the following:

1. One-on-one interviews with the Strategic Planning Committee members (n = 8)..
2. One-on-one interviews with key informants/past AIA leaders (n = 2).
3. Electronic survey of AIA members (n = 185).
4. Environmental Scan:
   - One-on-one interview with AIA national staff.
   - Review of targeted chapters' websites (Detroit, Middle Tennessee, Washington, DC, Northern Virginia, Baltimore, Boston).
   - Review of targeted chapters' IRS Form 990s.
   - Research and literature review on trends in membership in general and the architectural profession specifically.

The following summarizes the findings of the above activities, including interview themes, survey data, and the environmental scan findings. The environmental scan section of the report includes information about trends in AIA chapters and in professional associations that are relevant and can inform AIA St. Louis' work in the future. Finally, a summary and strategic questions address implications of the information and data collected.

### A. Interview Themes

Interviewees were asked a series of questions regarding the organization's strengths, challenges, opportunities and important issues to address for the future. The following summarizes the major themes they cited.

Strengths
- Continuing Education and the ability to track credits earned.
- Committees offer a range of ways to get involved with the chapter.
- Reputation as the premier professional association for architects.
- Design awards is a major event.
- Bookstore is an asset.
- Resource center provides a "home base" for the chapter in a unique way as well as libraries for professionals/firms that do not have them.
- Architecture community is professionally diverse.
- Financially stable chapter.
- Talented executive director/paid staff.
- Affinity groups add value (e.g. Young Architects Forum, Women in Architecture).
- Membership allows for networking and camaraderie with other members.

Challenges
- Homogenous membership: lack of diversity in the profession, perception of lack of diversity in AIA members.
- Too many committees make it hard to keep track of what's happening and what programming is available.
- Executive Director's transition.
- Programs have been offered in the same way and on the same topics for many years.

- Professionals can get continuing education credits within their firms, reducing the need for AIA's CEUs.
- Board recruitment and engagement.
- Without a strategic plan, leaders struggle to set direction and pursue cohesive plans.
- Membership benefits are not well understood.
- Helping women and emerging professionals stay in the workforce
- Website and other digital marketing/communications needs changes.

Opportunities
- Leadership transition is an opportunity to bring new ideas and skills.
- Strategic plan will help guide work, align leaders to a single vision.
- Defining the value proposition of membership.
- Partnerships with other organizations.
  - Association of General Contractors, U.S. Green Building Council, Urban Land Institute, American Society of Landscape Architects, International Interior Design Association, St. Louis Council of Construction Consumers, Graphic designers.
  - Partnering with schools to help students understand the value of AIA membership.
  - Leadership on policy and advocacy at the local and regional levels, taking positions on issues relevant to the profession.
  - Expanding the Design Awards to increase revenue and engage a broader audience.

Trends and Significance Issues
- Affordable housing.
- Changing technology.
- Sustainability, climate change, and environmental protections.
- Project delivery is changing; moving away from design-bid-build.

**B. Environmental Scan**

A review of information on membership trends in organizations, and a discussion with the national organization, revealed the following information.

1. **Trends in Membership Associations** (*2019 Membership Marketing Benchmarking Report, prepared by Marketing General Incorporated*)
   - Among the 218 associations that responded to the survey, 45% report that their membership had increased in the last year.

   - The median increase in membership is 12%
   - When asked the question, "How compelling is your association's value proposition for membership?", respondents indicated the following:
     - Very Compelling            11%
     - Compelling                 38%
     - Somewhat Compelling        41%
     - Not very compelling        9%
     - Not very compelling at all 1%
   - About half of the associations surveyed adopted or considered adopting a new membership model.*
     - 50% adopted a tiered membership model, which provides different benefits at different levels of membership (i.e. the more you pay, the more benefits you receive)
     - 22% added "special interest" memberships for specific groups such as students, retirees, etc.
     - 15% adopted combination memberships, meaning members can opt in as individuals or as organizations
   - Associations reported the following about the ages of their members:
     - 10% Born 1945 or earlier
     - 36% Baby Boomers (1946-64)
     - 29% Gen X (1965-79)
     - 20% Millennial (1980-95)
     - 6% Gen Z (1996 and later)
   - Marketing
     - 58% of associations have marketing budgets of $50,000 or less
       - 30% spend $0 - $10,000
       - 28% spend $10,001 - $50,000
     - Of organizations with a dedicated marketing budget, 15% use paid digital marketing.
       - Among these organizations, Facebook is reportedly the most effective way to attract members through paid digital marketing, followed by search engine optimization.

   *Some associations offer some combination of many types of membership*

2. **Trends in AIA Chapters** *(Interview with Susan McDaid, Senior Vice President, Member and Component Services; AIA review of organizational websites; and review of IRS Form 990 (2017), accessed through Guidestar.org)*

- Curated programming and content for members
  - Members find general information about architecture, design, and products helpful, but the most popular programming engages members with information relative to their specific interests, their career development, and issues that affect the communities where they are working.
  - Chapters are engaging emerging professionals through networking and connection with seasoned professionals, curated conversations about career transitions and business ownership, and the "Christopher Kelley model" of cohort-based leadership development.
  - Chapters in urban areas focus programming on social challenges related to the profession: redlining, segregation, infrastructure, etc.
- Non-dues revenue
  - Successful chapters are very focused on securing contributed revenue, including grants that support programming and operations; some chapters have staff dedicated to fundraising.
- Focus on the public and non-professionals
  - Some chapters focus their programming, outreach, and even membership on those who are interested in architecture and design but do not work in the field.
- Committee and programming are commensurate to staff support
  - The chapters with the most robust program offerings and the most active committees, are those that have a staff dedicated to such activities, often 4-5 paid, full-time staff.

| Chapter | Budget | Member dues revenue/ percentage of expense | Number of Staff | Number of Committees |
|---|---|---|---|---|
| **Detroit** | $291,687 | $75,981 (26%) | 2 | 11 |
| **Baltimore*** | $514,447 | $237,947(46%) | 8 | 17 |
| **DC*** | **$2,225,724** | **641,790 (28%)** | **11** | **15** |
| **Northern VA*** | $285,392 | 168,657 (59%) | 4 | 17 |
| **Middle TN**** | $326,420 | 113,249 (35%) | 3 | 10 |
| **St Louis** | $354,278 | 189,527 (53%) | 2 | 14 |

*Chapters with 1,000+ members
** Only 2016 IRS Form 990 available

### C. Member Survey Results

An e-survey was developed and distributed to 800 dues paid and non-dues paid members of the AIA-St Louis chapter; responses were received from 185 people. Several key findings are noted below.

Survey Participant Profile

- About 80% of the 185 respondents have been in the profession 10+ years and over half (54%) have been AIA members 10+ years.
- The majority (82%) work in Commercial/Industrial fields followed by education, health care and residential (multi-family).
- About 30% work in firms with less than 10 employees and another 30% work in those with 100 or more employees.

Member Involvement

- Sixty percent (60%) of respondents attend three or more AIA-sponsored events a year; 8% do not attend any events
- The primary reason for not attending is lack of time. (47%)
- Opportunities for education and professional development are both the motivation for joining (75%) and the most valuable benefit (75%)
- While 85% of the survey respondents were aware of the new Resource Center, only 11% said they would definitely use it; another 18% said they probably would.
- About one-third of respondents agreed that dues are an appropriate amount for the benefits we receive; another 39% indicated that they did not agree or disagree.
  - Almost half (49%) believe the dues amount is "just right"

The following indicates responses to each of the member survey questions.

**Motivation for Joining** (What motivated you to become a member of AIA St. Louis?)

| | |
|---|---|
| *Opportunities for education and professional development* | *75%* |
| *The AIA/Associate credential* | *65%* |
| *The opportunity to network with colleagues* | *59%* |
| *Affiliation/recognition with fellow architects* | *50%* |
| *My employer provides a membership* | *43%* |
| *Access to membership benefits* | *36%* |
| *I am interested in being a leader in the field* | *36%* |
| *Support and guidance on regulations and codes* | *24%* |

**Most Valuable Benefit** (In your opinion, what is the most valuable benefit of membership?)

| | |
|---|---|
| Opportunities for education and professional development | 75% |
| The AIA/Associate credential | 65% |
| The opportunity to network with colleagues | 59% |
| Affiliation/recognition with fellow architects | 50% |
| My employer provides a membership | 43% |
| Access to membership benefits | 36% |
| I am interested in being a leader in the field | 36% |
| Support and guidance on regulations and codes | 24% |

**Level of Participation** (How often do you participate in AIA sponsored activity?)

| | |
|---|---|
| Every few months | 38% |
| Once a month | 26% |
| Once a year | 14% |
| Every six months | 12% |
| Do not participate | 8% |
| Other | 6% |

**Frequency of Attendance** (When you are unable to attend AIA-sponsored activities, what is the primary reason?)

| | |
|---|---|
| I do not have time for additional commitments | 47% |
| I'm not interested in the programs/activities being offered | 22% |
| Activities are held at times I can't participate | 21% |
| I'm unaware of the events | 3% |
| Other | 7% |

**Awareness of Resource Center** (Are you aware of the opening of AIA St. Louis' the new Resource Center?)

| | |
|---|---|
| *Yes* | *85%* |
| *No* | *15%* |

**Likelihood of Use of Resource Center (How likely are you to use the Resource Center in your work?)**

| | |
|---|---|
| *Possibly* | *31%* |
| *Probably not* | *31%* |
| *Probably* | *18%* |
| *Definitely* | *11%* |
| *I don't know* | *5%* |
| *Definitely not* | *4%* |

**Value of Membership** (Indicate whether you agree or disagree with the following statement: AIA St. Louis asks members to contribute annual dues that are an appropriate amount for the benefits we receive.)

| | |
|---|---|
| *Neither agree nor disagree* | *39%* |
| *Agree* | *29%* |
| *Disagree* | *16%* |
| *Strongly agree* | *9%* |
| *Strongly disagree* | *7%* |

**Dues Level (**Please complete the following statement about the amount you pay in annual dues: The amount members pay in dues each year is...)

| | |
|---|---|
| *Just right* | *49%* |
| *Too expensive* | *42%* |
| *Not very expensive* | *7%* |

## D. Discovery Phase Summary and Implications

Based on the findings of the planning Discovery Phase, The Rome Group identified several areas to address as part of AIA St. Louis' strategic planning process. The organization is financially stable, has engaged members, and is entering a period of leadership transition so it was an opportune time to consider how changes in the environment and trends might affect AIA St. Louis' future direction.

Questions for Consideration

1. *How can AIA St. Louis better engage emerging professionals?*
   The sense among members is that while the St. Louis chapter provides free memberships to recent graduates and supportive services to young professionals working toward licensure, the Chapter can do more to bring in professionals who are early in their careers. The issues that most affect their membership and engagement include time commitments, cost of membership, and lack of connection to those they perceive to comprise AIA members.

2. *How can AIA diversify its membership and provide meaningful opportunities for engagement, inclusion, and leadership?*
   Stakeholders report that AIA needs younger professionals, women, people of color, and others from marginalized backgrounds in its membership. In addition, the board and those in leadership positions should reflect this more diverse population of professionals in the region. This has implications for the chapter's recruitment efforts in addition to the programming and events that help professionals become and remain engaged.

3. *How can we strengthen our value proposition and communicate it to members and potential members?*
   Members want to ensure that the benefits they receive from AIA St. Louis are worth the cost of annual dues. This is especially important to consider given that many members who work in larger firms have access to continuing education on a regular basis. While CEUs are cited as a major benefit of AIA membership, many professionals can obtain them elsewhere. The chapter must also interrogate the difference between services provided for the public and the profession overall and benefits that are available exclusively to its membership.

4. *How can AIA St. Louis provide engaging, diverse programming that interests members, professionals, and the public?*
   Stakeholders cite AIA's continuing education, events, and committee efforts as strengths of the chapter. They also recognize the need to ensure that this programming appeals to members with diverse interests and professional experience. There is some expectation that AIA also be a go-to resource for the profession overall. Other chapters have achieved this through architectural tours, events that attract "architecture enthusiasts," and engaging on community and social issues that appeal to wide audiences.

5. *What is the best role for the chapter in promoting sound policy and advocating for its members and the issues that affect them?*
   AIA leaders have in the past taken positions on community and policy issues that are relevant to its members and the profession. Stakeholders cite this as an important function of AIA and

would like to see the Chapter do this on a more regular basis. Many leaders envision architects being as influential as developers and contractors are in matters of affordable housing, community development, and other issues that attract the attention of government officials.

6. *What additional staffing and resources does the chapter need to ensure it has adequate infrastructure and support for high-quality programming and services?*
   Chapters that have the most robust programming and active committees are those that have dedicated significant staff resources to these areas. This often requires staff positions dedicated to member services, programs, communications and development and the chapters raise the revenue to support these positions, finding ways to bring in contributions in addition to revenue from member dues.

## IV    Strategic Plan Goals and Objectives: 2020-23

Following discussion with the Strategic Planning Committee, and the Board of Directors, the following goals and objectives were developed to provide the framework for AIA St. Louis' priorities for the next three years.

**Goal 1: Develop a clear and compelling value proposition for AIA St. Louis membership**.

Objective 1.1:  Evaluate and align the benefits of membership to ensure that they offer value to our members and evaluate member retention and satisfaction.

Objective 1.2: Identify key messages to communicate to AIA members and other architects; allied professions; and others that could benefit from the chapter's offerings about the value of AIA membership.

Objective 1.3: Develop strategies to communicate the value of membership at programs/events and through social media, as well as promoting AIA as a leader in design and architecture.

Objective 1.4:  Develop a program to target prospective members and orient and welcome them when they join.

Objective 1.5: Position AIA St. Louis and its members as a valuable resource for the general public.

**Goal 2: Increase diversity and inclusion.**

Objective 2.1: In consultation with chapter members, leaders, and partners, develop and implement outreach and programming that would appeal to a wider group of participants. (See Goal 1 above)

Objective 2.2:  Develop strategies that support female architects to stay engaged, seek leadership opportunities in their careers and remain in the profession.

Objective 2.3:  Increase membership of racial and ethnic minority architects in AIA St. Louis.

- o  Tactic: Solidify and enhance the partnership between AIA St. Louis and NOMA's St. Louis chapter.

Objective 2.4:  Create opportunities to engage young architects and emerging leaders through programming, targeted development efforts and outreach.

Objective 2.5:  Increase diversity in the profession through outreach to K-12 students to help them see pathways to architecture as a career utilizing current committee and program efforts to reach students in the urban core (e.g. Volunteer Speakers Bureau, Building Futures, Women In Architecture/Hawthorne School).

**Goal 3: Strengthen programming, member engagement, and public awareness.**

Objective 3.1: Develop training/programs that address the Chapter's diversity and inclusion objectives.  (See Goal 3 below).

Objective 3.2:  Adjust AIA's programming to respond to members' interests and needs including advancement within the profession and opportunities for networking with colleagues.

Objective 3.3: Develop curated leadership development programs, potentially using the national cohort model.

Objective 3.4: Maximize the use of technology to deliver programming.

Objective 3.5: Identify ways to collaborate on professional development and programming with member firms and other organizations and including public awareness activities.

   o  Tactic: including more "public" programming (tours, book signings, etc.).

Objective 3.6: Enhance offerings and usage of the Resource Center in order to serve as a "home base" for AIA St. Louis, provide a public-facing space for building community in the profession.  (See Goal 5)

Objective 3.7.:  Evaluate program and membership costs to ensure this is not a barrier for attendance and explore strategies for addressing costs if necessary.

Objective 3.8: Consider ways to influence state and local/municipal policy.

**Goal 4: Ensure financial sustainability.**

Objective 4.1: Develop a financial model and plan to generate revenue opportunities through use of the Resource Center.

Objective 4.2: Create and implement a financial development plan that focuses on non-dues revenue.
   o  Tactic: Create a short-term plan (i.e. a three-year plan).
   o  Tactic: Create a long-term plan for out-years.

Objective 4.3: Evaluate the need for local dues adjustments for AIA St. Louis members.
   o  Tactic: Consider an annual cost-of-living adjustment for dues.

**Goal 5:  Evaluate organizational capacity to fulfill the mission.**

Objective 5.1: Assess the role of the board and all committees to ensure effectiveness and efficiency, to avoid duplication of efforts, and to encourage collaboration among volunteer leaders.

Objective 5.2:  Determine staffing and volunteer needs to implement the plan, including Involvement of member firms, committee members, and others who have expertise that can benefit our AIA members.

Objective 5.3:  Develop a strategy for succession planning throughout the organization, particularly to prepare for the transition of the Executive Director and other volunteer leadership roles.

Objective 5.4:  Determine a formal strategy for recruitment and retention of volunteers to increase engagement and advance the goals of the chapter.

Objective 5.5: Prioritize staff training to maximize effectiveness as professional resource to members and the public.

# V    Strategy Screen

The following criteria were identified as those most important for AIA St. Louis to use in making decisions about direction and new opportunities.

| CRITERIA | Strategy 1 | Strategy 2 |
|---|---|---|
| **ACHIEVE MISSION:** The American Institute of Architects (AIA) St. Louis is the voice of the architectural profession, dedicated to serving its members, advancing their value, and improving the quality of the built environment.   AIA St. Louis provides services and fellowship to the architectural profession and eastern Missouri. | | |
| 1.  **We have or can get the financial resources to support the strategy.** | | |
| 2.  **We have or can develop the staff or volunteer capacity to support the strategy.** | | |
| 3.  **It will lead to increased equity and inclusion in the chapter.** | | |
| 4.   **It is consistent with AIA National policy and position statements.** | | |
| 5.  **It will help AIA STL to grow membership or energize current base.** | | |
| 6.   **It increases awareness of policy and advocacy.** | | |
| 7.  **It will enhance our chapter's position as a leader and innovator in the profession and among allied professionals.** | | |

# VI.    Action Plan Template

The following is a template for staff, working with the appropriate volunteer committees, to use in developing specific tasks required to implement the plan's goals and objectives.  The activities noted below under Goal 1, Objective 1.1. were developed by The Rome Group to illustrate the use of the template.

**Goal 1:    Develop a clear and compelling value proposition for AIA St. Louis membership.**

**Objective 1.1:** Evaluate and align the benefits of membership to ensure that they offer value to our members and evaluate member retention and satisfaction.

| Activities | Completion Date | Lead Staff Responsible | Key Metric(s) |
|---|---|---|---|
| 1.  Create a membership task force of board and other volunteers to lead the process. | September 2020 | | |
| 2.  Create and administer a membership survey to measure members' and allied professionals' attitudes, priorities, and needs. | November 2020 | | |
| 3.  Determine the need for additional membership levels and the benefits offered at each level. | December 2020 | | |
| 4.  Communicate to members and other target audiences new information about membership. | January 2021 | | |
| 5.  Coordinate with committee responsible for assessing potential dues increases. | December 2020 | | |
| Resources Required: | | | |

## Appendix A: Planning Interviewees

Strategic Planning Committee

Barb Anderson-Kerlin, AIA St. Louis Board President, HOK
Charles E. Bell, President, Charles E. Bell Architects, Inc.
Joel M. Fuoss, Principal, Trivers
Cody Henderson, AIA St. Louis Board President-Elect, Feeler S. Architects
Christina Henning, Mackey Mitchell
Djuan Jackson, St. Louis NOMA Board Secretary, Jackson Architects
Kelsey D. Jordan, Chair, Hawthorne Committee
Jason Dale Pierce, Architectural Discipline Director, Jacobs


Key Informants

Bob Winters, Principal, Ottolino Winters Huebner
Valerie Greer, Professor of Practice, Sam Fox School, Washington University


Environmental Scan

Susan McDaid, Senior Vice President, Member and Component Services, AIA National