

STRATEGIC PLAN

Northeast Region Construction Specifications Institute, Inc.

FY 2000 Lake Placid, New York
Adopted - September 15, 1999

PREFACE

Natural temptation is to try to be all things to all people. The result of this approach is not doing anything particularly well. Strategic Planning is the counter to the "All Things Syndrome". It is about identifying those key activities that the Northeast Region must undertake to utilize its limited resources to optimize the value which it presents to its Chapters and their members.

Introduction / Background

In August 1998, region leaders decided that a strategic plan be undertaken. Upon initiation on September 9, 1998, by the Northeast Region Board of Directors, the Strategic Planning Committee began to develop the attached document. The initial draft was prepared February 20-21, 1999, and subsequently presented to the Region Board on March 12-14, 1999. Workshops were conducted in March and May, 1999 to all region board members and chapter presidents. The Committee reviewed comments received, and revisions were made on May 14-16, 1999 and August 6-7, 1999. A final draft of the Strategic Plan was submitted to the Board for approval on September 15, 1999. At that time this plan was adopted.

This Strategic Plan defines the goals and objectives of our region.

Adopted by the Northeast Region Board on September 15, 1999

Northeast Region Strategic Planning Committee

Dennis M. Pelletier, FCSI, CCPR, Chairman

Paul L. DiBona, CSI, CCS

Denis L. Lemieux, CSI, AIA

William F. Foley, CSI, CCPR

Louis J. Matrulli, CSI, CCS, CCCA

Edward M. Healy, CSI, RA

Michael T. Owen, CSI, CDT

TABLE OF CONTENTS

Preface
Table of Contents
Overview

Strategic Plan Northeast Region CSI

The Future of the Region – 10 to 30 Year Horizon

Core Ideology
Core Purpose
Core Values

Corresponding Core Purpose – Region/Institute

An Envisioned Future
BAG
Vivid Description

Corresponding BAG – Region/Institute

5 Year Plan – FY 2005

Vision
Mission Statement

Corresponding Mission Statement – Region/Institute

FY 2005 Goals

FY 2005 Goal No. 1
FY 2005 Goal No. 2

Corresponding Long Range Goals – Region/Institute

The Next Step

Appendix
Intermediate Strategic Planning Assumptions

OVERVIEW

The challenge of leading an association today is finding out and responding to what really matters to the membership.

- Know the forces, trends, challenges (opportunities and threats) in the marketplace of our membership.
- Know the preference of our membership concerning those issues.
- Know the strategic position and capabilities of the association.
- Know the implications of our choices.

We need to develop a reputation for delivering value not only to the membership, but also to the profession and the industry.

- Need clarity and consensus of what constitutes meaningful value.
- Need confidence in meaningful and beneficial objectives.
- Need to share a core ideology and values.
- Need to steer and maintain a predetermined direction.
- Need to establish a continuity in programs.
- Need to develop strategic alliances with other organizations.

As an association, what must we do to enhance the value and effectiveness of the Region for our chapters and their members? We have to be able to:

- Define our existence and purpose.
- Identify our current status as a benchmark.
- Recognize that the world, our industry and professions are changing.
- Establish a 10 to 30 year horizon, and determine how we need to be positioned.
- Identify the intermediate issues and strategic choices about our vision.
- Establish a Region 5-year plan – FY 2005 with a mission, goals, objectives and strategies.
- Annually review and execute a Region operating plan to move the process, to accomplish the strategies so we can achieve the goals and objectives of the strategic

planning process.

What will the Region's Strategic Plan do for the chapters and membership? An appropriate plan will attract and influence membership participation and involvement.

- A plan increases the potential for revenue because it demonstrates organization and professionalism in the Region's programs.
- A plan avoids wasted action and mistakes, delegates the work load, thereby saving time, work and stress on the core members.
- A plan organizes and applies the strengths, skills, abilities, and interests of the members in a constructive way to add value to the Region.
- A plan increases efficiency and effectiveness by creating purpose.
- A plan establishes priorities for the use of limited resources and modest budgets in the realization that we cannot do everything for everyone.
- A plan unifies and supports a consensus towards goals and objectives.

Strategic Plan

Northeast Region CSI

• *The Future of the Region – 10 to 30 Year Horizon*

The Northeast Region's Strategic Plan presents a 10 to 30 year horizon consisting of two major components, a Core Ideology and an Envisioned Future.

Core Purpose:

Support, represent and serve region chapters and our members.

Core Values:

- Broad based membership
- Effective communication
- Networking
- Information interchange
- Leadership training
- Organization and industry mentoring
- Responsiveness to members
- Recognition of competence
- Social interaction / fellowship

CSI's Core Purpose is:

To improve the process of creating and sustaining the built environment.

Northeast Region's Core Purpose is:

Support, represent, and serve region chapters and our members.

B A G

Big Audacious Goal (BAG):

The attainment of unprecedented chapter excellence and recognition, through the establishment and implementation of a region administrative infrastructure, promoting volunteer involvement.

Vivid Description:

The Northeast Region has established and implemented an administrative infrastructure, which has increased the membership and provided enthusiasm to a point that retention of members is no longer a concern. Our success has enabled the chapters and the region to generate continuous funds for the proper operation of programs. With addition of staff, our region has expanded our core group of leaders, eliminated burnout and has increased total member involvement. The value of CSI membership has enabled the region to be self-supporting.

Established strategic alliance partnerships with associated construction industry organizations have provided our members unequalled opportunity for networking and resources. Our prominence throughout the region has increased student affiliate participation thereby contributing to the future and growth of our chapters.

As a result, today the Northeast Region has assisted our chapters in attaining unprecedented excellence and recognition.

CSI's Big Audacious Goal (BAG) is:

CSI will be recognized worldwide as the indispensable resource for knowledge on the process of creating and sustaining the built environment.

Northeast Region's Big Audacious Goal (BAG) is:

The attainment of unprecedented chapter excellence and recognition, through the establishment and implementation of a region administrative infrastructure, promoting volunteer involvement.

5 Year Plan – FY 2005

VISION

- Restructure the region organization.
- Enhance region programs, and create strategic alliances.
- Establish effective outreach programs for students / generation X / non-affiliated members / non-members with certification credentials.
- Improve our performance and image within the following areas:
 - Region leadership and training
 - Technology sharing
 - Chapter to chapter exchange and communications
 - Region staff support

MISSION STATEMENT

To advance and promote fellowship, excellence, and professionalism, synergistically increasing the effectiveness, image and impact of our chapters as they serve their members and the construction industry.

FY 2005 GOALS

- **Goal No. 1** - Becomes the chapters' access to resources, services, support, information and promotion.
- **Goal No. 2** - Provides to the chapters, value exceeding member expectations and demands.

CSI's Mission Statement is:

The Construction Specifications Institute advances the process of creating and sustaining the built environment for the benefit of the construction community by using the diversity of its members to exchange knowledge.

The Construction Specifications Institute advances the process of creating and sustaining the built environment for the benefit of the construction community by using the diversity of its members to exchange knowledge.

Northeast Region's Mission Statement is:

To advance and promote fellowship, excellence, and professionalism, synergistically increasing the effectiveness, image, and impact of our chapters as they serve their members and the construction industry.

FY 2005 Goal No. 1

Becomes the chapters' access to resources, services, support, information and promotion.

Objective No. 1: Improve Performance

Strategy No. 1 - Restructure the region organization

Strategy No. 2 - Provide administrative staff

Strategy No. 3 - Develop an operational infrastructure and innovative funding mechanism.

Strategy No. 4 - Minimize CSI "Burn-Out"

Objective No. 2: Build Image and Identity

Strategy No. 1 - Create strategic alliances

Strategy No. 2 - Establish an effective outreach program

Strategy No. 3 - Develop a region marketing plan

FY 2005 Goal No. 2

Provides to the chapters value exceeding member expectations and demands.

Objective No. 1: Enhance Region / Chapter Relationships

Strategy No. 1 - Promote fellowship

Strategy No. 2 - Promote and expand member recognition

Strategy No. 3 - Advance training and leadership

Objective No. 2: Improve Information Exchange

Strategy No. 1 - Maintain and enhance a region CSI website

Strategy No. 2 - Improve and facilitate channels of communication

Strategy No. 3 - Serve as a bridge between the Institute and the chapter and its membership

CSI's Long-Range Goals are:

- ***CSI will be member's primary gateway to resources for programs, services, and the exchange of knowledge.***
- ***CSI will be the premier integrating force in the United States for improving the process of creating and sustaining the built environment.***

Northeast Region's Long-Range Goals are:

- *Become the chapters' access to resources, services, support, information, and promotion.*
- *Will provide, to the chapters, value exceeding member expectations and demands.*

The Next Step

Implementation of the Strategic Plan will set the course for the region in the new millennium.

The Region Board is responsible for development and execution of an annual operating plan to move the process, to accomplish the strategies, and to achieve the goals and objectives of the 5-year plan.

Updates of the Strategic Plan should preserve the core ideology and achieve the envisioned future.

The Region Board is responsible and accountable for managing the ongoing strategic planning process. This process will involve review, modification and updating our goals and strategies.

APPENDIX A

INTERMEDIATE STRATEGIC PLANNING ASSUMPTIONS

Assumptions made about the next ten to twenty years of the region.

Industry Trends

- *Instantaneous access and delivery*
- *Integration of information is critical*
- *Improved communication systems*
- *Technological advances*
- *Delivery systems and the development of Design / Build*
- *Outsourcing*
- *Globalization*
- *Manufacturer consolidations and buyouts*
- *"Just in time" syndrome / mentality*
- *Consolidation and harmonization of codes and standards*
- *Ability to recycle and reuse*
- *Generation issues*
- *A changing workforce*
- *Changing management styles*
- *More enlightened and experienced clients*
- *Designing for an aging population*

Professional Trends

- *Instantaneous delivery and expectation*
- *Downsizing / restructuring*

- *Continuing education requirements / credits*
- *Environmental concerns*
- *Life cycle design*
- *Partnering*
- *Peer review*
- *Information access and management*
- *Virtual reality*
- *Litigious society*

Institute Trends

- *Resource vs. source*
- *A broader membership focus*
- *Reduced volunteerism*
- *More diverse priorities for time and finances*
- *Perceived value vs. real worth*
- *Competition from other industry organizations*
- *Changing funding mechanisms*
- *"What's in it for me" a self-serving philosophy*
- *Social and networking changes*

Region Trends and Mega Issues

- *Globalization influences*
- *Environmental issues*
- *Dependent on Region economics*
- *A lack of Region identity*
- *Changing leadership roles*
- *Membership service and retention*

- *An aging membership group*
- *Generation issues*
- *Diminishing core groups – CSI burnout*
- *Lack of committed new members / leaders / core group*
- *"What's in it for me" a self-serving philosophy*
- *Defining value – justification for future members*
- *Area student population can be a resource for members*
- *Better communication opportunities (Internet, E-mail, etc.)*
- *Image building and industry acceptance*

Major Trends Affecting Associations *

- *The new leadership role and its' commitment to embrace change*
- *Expectation of perceived return on dues investment*
- *Responsiveness to external changes and emerging needs*
- *Governance to deal with complex and fast paced change*
- *Need for new revenue sources*
- *The impact of ever-changing technology and usage*
- *Mastering unplanned changes and unexpected consequences*
- *Questions dealing with generational issues of members*
- *Securing a qualified workforce*
- *Outsourcing and co-sourcing of business functions*
- *Increasing vulnerability to competition and alliances*
- *Increase in consolidations and mergers*
- *Globalization*
- *Need for visibility and image building*

** Results extracted from a 1998 survey conducted by ASAE.*

Association Trends that Impact the Region

- *A new leadership role and its' commitment to embrace change.*
- *Meeting rising member expectations and return on investment.*
- *Address generational shifts among members and boards.*
- *Image building and a need to promote members' credibility.*

End of Strategic Plan