

Strategic Plan Report 2023-2025

The board of directors, select members, and staff met at Mount Vernon Canyon Club to develop a strategic plan, spanning three years. <u>ACEC Colorado</u> is recognized by the IRS as a 501(c)6 organization, founded in 1956. Its staff also operates the subsidiary 501(c)3 <u>ACEC Colorado Scholarship & Education Foundation</u> and the state-registered <u>Consulting Engineers Political Action Committee (PAC)</u> with IRS 527 status.

As of June 30, 2022, ACEC Colorado is the fourth largest Membership Organization in the ACEC National Federation with 260 member firms. For fiscal year 2023 (July 1, 2022-June 30, 2023) ACEC Colorado's annual operating budget is \$1.1 million with approximately 40 percent in reserves. The staff is currently made up of four positions: executive director, associate director, programs and sponsorship director and membership services coordinator. The board is comprised of 12 members from a full range of firms by size and service offerings.

ACEC Colorado updates its strategic plan every three years, serving as a guide for the board, staff and committees. The 2019-2022 plan (infographic) was developed in November 2019. The goals included Advocacy, Professional Development, Firm Success, Public Value, and Organizational Excellence. To prepare for the 2023-2025 plan, the officers and executive director provided advance input. The 2019-2022 goals, current budget and committees were analyzed, and the ACEC National strategic plan (updated April 2021) was reviewed to ensure alignment with the state's plan.

Significant influences have impacted ACEC Colorado including the pandemic and its effect on membership, association events and programs. Also, the retirement of a past and appointment of a new executive director occurred in January 2022, following a seven-year transition plan involving the former and latter individuals.

In reviewing the goals, the board suggested only three. The goal of "Professional Connections," was said to transverse all the goals, thus did not need to have its own emphasis. (There is a fourth goal regarding association infrastructure that was suggested to serve as the basis for the plan's three value-deliverable goals.)

Throughout the day, the cornerstone of the plan was built upon diversity, connections and relations. This was referenced as the "Hub" or "Core" that connects firms and people¹.

¹ Communication_Hub.png

Mission & Vision Statements

A <u>mission</u> statement conveys the organization's purpose to internal and external audiences. A <u>vision</u> statement is a long-term desired outcome and enhances the intent of the mission.

In 2019, the board reduced its mission at that time² to be more precise and easier to communicate as, "ACEC Colorado advances a business environment that helps consulting engineering firms thrive."

At the 2022 planning meeting, the board proposed the <u>mission statement</u> to be broader, embracing more firms and expanding the association stakeholders: "ACEC Colorado advances a business environment that helps professional design firms thrive.TM"

The <u>new vision</u> of ACEC Colorado was proposed as:

"Connecting the professionals who improve the natural and built environments."

Goals

The goals are the <u>core competencies</u> of ACEC Colorado. They should communicate value to members and stakeholders.

- ADVOCACY Become the trusted advisor to advance, protect and promote public policy and build relationships with aligned stakeholders.
- II. **FIRM SUCCESS** Provide the resources and opportunities to support firm and career success.
- III. PUBLIC VALUE Demonstrate and communicate the value engineering brings to society.
- IV. **ORGANIZATIONAL EXCELLENCE** Maintain a vibrant ACEC Colorado membership organization through leadership and resources.

Strategies

The strategies and priorities are programs to deliver member value. Staff will add performance metrics (KPIs) and a timeline in a program of work. The association associate director tracks the strategic plan. It was suggested a member of the board be assigned as the strategic-plan champion to monitor and report on progress.

- I. ADVOCACY³ (Influence)
 - A. **Relationships** Facilitate, leverage and build bipartisan relationships so that members have a strong voice in local, state and federal governments through grassroots involvement coupled with an effective lobbying team.⁴
 - B. **PACs** Demonstrate the purpose and value of balanced support of state and federal PACs and ensure continued viability of the state PAC through innovative fundraising.
 - C. **Issues Management** Identify issues that impact member firms, evaluate potential impacts and develop solutions at the legislative, policy and implementation levels.⁵

² Pre-2019 Mission: "To assist members in achieving higher professional, ethical, business and economic standards, enabling member firms to provide quality consulting engineering services for their clients and the public."

³ Advocacy performance indicators to track include "wins," number of issues, support, and contributions by the state and national PACs. ACEC Colorado endorsed state legislative candidates in 2022 with a 67.5%-win ratio; the board will reconsider the value of endorsements vs. PAC contributions, relationships, and scorecards.

⁴ Broaden relationship outreach to chambers of commerce and economic development.

⁵ Issues identified include QBS, license sunset review, mandatory CE, and workforce development.

II. FIRM SUCCESS⁶ (Support)

- A. **Educate** Maintain high-quality <u>programs</u>, an <u>annual conference</u>, new <u>educational content</u> and a <u>leadership development program</u> to serve the evolving needs of members and the profession.⁷
- B. **Resources & Tools** Provide information, access to expertise and tools (e.g., <u>Salary</u>, <u>Benefits & Business Practices Survey Report</u>) to support member prosperity.
- C. **Engagement** Address industry concerns with agencies and stakeholders. Connect member firms with agency leaders to support firm success.
- D. **Promote Consulting Value** Package and communicate the story consulting engineers have on every aspect of society. Serve as the voice of the profession and increase interest in careers.
- E. **ACEC Colorado Foundation** Broaden the purpose and work of the foundation to further benefit firm success through continued and new efforts in the areas of outreach and education; grant pursual for workforce development and diversity, equity and inclusion (DEI) initiatives; and scholarship awards to students.

III. PUBLIC VALUE⁸ (Impact)

- A. **Economic Impact** Determine and promote the impact of professional design firms in Colorado.
- B. **Awards & Recognitions** Continue the <u>Engineering Excellence Award</u> and <u>Honor Awards</u> programs and leverage them to be of benefit to the firms by increasing public awareness.
- C. **Media & Digital Presence**⁹ Maintain a strong social media presence and enhance the website and other digital marketing strategies to connect the profession, stakeholders and members. Further build a media relations strategy (especially with non-trade outlets) to draw public interest in the profession and be the public face of consulting engineers in the state.
- D. **Public Awareness** Promote annual <u>Colorado Engineers Week</u> through creating outreach events for students (middle school through college) and the public to interact and learn about consulting engineering. Tell the story of consulting engineers' impact on society through awareness campaigns throughout the year.

IV. ORGANIZATIONAL EXCELLENCE¹⁰ (Lead)

- A. **Innovation & Growth** Explore possibilities to expand the footprint of ACEC Colorado in the state and Rocky Mountain region through initiatives created by either the council or foundation.
- B. **Membership Growth** Consider opportunities with additional categories to embrace all professionals, offering them a package of "business benefits" beyond national ones and review the state dues model.
- C. **Governance** Identify members willing to govern on the board and serve in leadership roles on committees/forums/coalitions. Update governing documents following legal audit.¹¹
- D. **Professional Staffing** Maintain sufficient staffing capacity, support staff with professional development, technology and a quality work environment. Remain flexible to adjust during times of uncertainty. 12
- E. **Financial Strength** Sustain strong revenue streams while seeking innovative new sources of income and building sufficient reserves. Adopt periodic audit process and policy.

⁶ Firm success performance indicators include educational program attendance, development of new educational content, revenue, receipt of grants, etc.

⁷ Conduct member surveys to identify firm and professional interests. Discussed offering customized targeted training for firms wanting education for their employees.

⁸ Public value performance measure will include public recognition and impressions, successful award processes and development of an economic impact statement.

⁹ Discussed potential of an association name change.

¹⁰ Performance metrics will include budget expectations, new revenue, ratio of savings, update in governing documents, etc.

¹¹ Review bylaws, consider renaming the topical committees as forums intended to facilitate discussion and exchange knowledge.

¹² Invest in development of an employee handbook.