

CAPPA Strategic Planning Outline
Grand Forks, North Dakota
September 25, 2009

This report is to summarize a mechanism through which CAPPA may develop short term (annual) and long term (five years) strategic plans. This is intended as a model or road map through which the CAPPA Executive Committee can develop a plan. At a minimum, we would intend the final planning result to:

- (a) Adopt a set of management principles for addressing the organization's strengths, weaknesses, opportunities and threats.
- (b) Identify the central focus of the Strategic Plan (e.g. "meeting the needs of CAPPA's constituents") and
- (c) Create six, near-term objectives.

This approach would integrate the use of a typical S.W.O.T. analysis with a set of leadership principles commensurate with the responsibilities inherent in guiding and directing a professional organization such as CAPPA. Below is a summary of the phases of plan development that seem prudent at this time.

Phase I – Assessment

- A. Environmental Scan – What are the important current social, fiscal and political parameters that set the boundaries of our operating environment?
 - 1. CAPPA constituents (e.g. members, plant directors and the institutions they serve) are facing unprecedented fiscal challenges.
 - 2. Economic conditions are impacting CAPPA's business partners whose financial support of the annual conference and other education events is crucial.
 - 3. APPA is refocusing its Strategic Plan to cope with economic conditions. CAPPA will be part of that effort.

4. Despite economic conditions, CAPPAs Plant Directors and staffs are expected to provide leadership in a renewed effort to establish more sustainable campuses.
5. At the national level, there is growing political and societal pressure to lower the cost of higher education.
6. Mood of the membership
 - a. Membership confidence in the ability of CAPPAs and APPAs to provide timely, accessible and topical support?
 - b. Lack of understanding about social, professional and personal rewards of participation on CAPPAs board, committees or taskforces.
 - c. Lack of knowledge about the benefits of attending CAPPAs and APPAs educational offerings.
 - d. Inertia – Too busy or lack the funds to get involved.
7. Demographics
 - a. When baby boomers retire who will replace them (on the Board and on our campuses)?
 - b. Is the CAPPAs training-delivery-mode and content relevant to Generation X and Generation Y.?
 - c. Where will the next generation of technicians, custodians and grounds workers come from?
 - d. Younger CAPPAs members place high value on credentialing and portability.
 - e. Migration of management talent from commercial real estate industries and the military into higher education is helping to fill the vacancies. Career higher education facility managers are in short supply.
8. Some members have difficulty selling the value of CAPPAs and APPAs participation and training to their bosses (institution Vice President or President).
9. Staff recruitment problems and selling CAPPAs / APPAs to the boss are not uniform in all markets and on all campuses.
10. Competition from other professional support organizations, ex. IFMA, ASHRAE, etc.

- B. Peer Review. The CAPP Board might choose to review the strategic plans of peer organizations to see how other professional organizations have identified “Characteristics of Success” (e.g. the elemental activities at which the organization must excel to be considered successful.).

Characteristics of Success

To be successful should we:

1. Provide quality leadership and improve the CAPP “brand.”
2. Improve relationships (with APPA, other APPA regions state and local chapters, other associations).
3. Improve communications.
4. Be sound financial managers.
5. Provide excellent service to members.

Phase II – Analysis and Discovery

S.W.O.T. Analysis – A typical S.W.O.T. review template might be considered as:

Leadership and Branding

Strengths

- a. Do we have commitment of the CAPP Board members?
- b. Do we demonstrate a strong APPA Brand?
- c. Do we currently have a strong Board of concerned engaged professionals?
- d. Do we demonstrate a strong desire to grow, change, look to the future?
- e. Do we demonstrate willingness to collaborative supportive relationships?
- f. Solid financial position?

Weaknesses

- a. Geography (breadth hampers travel and limits face to face collaboration)?
- b. Small membership (smaller base from which to cull volunteers)?
- c. Lack of diversity (ethnic)?
- d. Recruiting new young members?

Opportunities

- a. Develop a strategic plan?
- b. Recruit K-12 + 2 year schools?
- c. Increase member diversity?
- d. Retention (we should pay more attention)?

Threats

- a. Demographics (difficulty interpreting needs of younger members)?
- b. Only volunteers available to work on Objectives – no permanent staff?
- c. Competition for members (from other professional organizations)?
- d. Economy – near term challenges?
- e. Limited Resources – time, people, money?

Communications

Strengths

- a. Strong Information Services Committee good use of web site?
- b. Newsletter?
- c. Intra-organization, Intra-committee?
- d. Annual meeting (record of success)

Weaknesses

- a. Geography?
- b. Website?
- c. Need better communication focus / strategy?
- d. Lack of communication with IFMA/SCUP/NACUBO/K-12/Community College/other professional organizations?

Opportunities

- a. Newsletter (make it even better)?
- b. Website?
- c. Evolving communications technologies?
- d. Retiree involvement?
- e. Facilities maintenance students?
- f. Publicize successes?
- g. Annual meetings (make program better)?

Threats

- a. Limited resources – time, people, and money?
- b. Weak Brand?
- c. New technologies (do we have time, talent & money to exploit?)
- d. Lack of confidence of membership?
- e. Age groups in the organization (can we satisfy all?)
- f. Diversity?
- g. Communication with institution leadership?

Relationship with APPA

Strengths

- a. Special relationship (APPA staff feels CAPP is a leader among regions?)
- b. Strong commitment at many CAPP institutions
- c. Strong commitment to APPA service at national level (disproportionately high number of APPA Presidents from CAPP)?

Weaknesses

- a. Some institutions demonstrate weak commitment?
- b. Communications?
- c. Small membership?

Opportunities

- a. Improve communication?
- b. Increase membership
- c. Relationships (exploit strong relationship with Executive Vice President Lander Medlin)
- d. Increase role in APPA leadership?
- e. More local programs (in addition to annual meeting)?
- f. Web integration?
- g. More aggressive nomination of candidates to APPA offices?

Threats

- a. APPA policy decisions and board actions?
- b. Economic uncertainty?
- c. Small membership vulnerable (it is a big percentage hit if we lose several schools)
- d. Lack of aggressive nominations?

- e. Complacency?

Service to Constituents

Strengths

- a. Annual meeting content
- b. Common language
- c. Business partners

Weaknesses

- a. Diversity/language
- b. Communication weaknesses between CAPP Board and members
- c. Member accessibility to services
- d. Business Partner CAPP support needs to be improved

Opportunities

- a. Business Partner, membership relationship
- b. Better marketing to constituents
- c. CAPP Committee development
- d. Create more state chapters
- e. Market state chapters
- f. Greater state focus

Threats

- a. Services offered by other organizations?
- b. Resources?
- c. Lack of focus – too many opportunities for us to pursue?
- d. Loss of business partners?

Six Key Initiatives could include:

1. Update the Annual Meeting Programs to better meet the needs of the average member.
2. Develop a communications strategy and publicize individual and group accomplishments. (This would include updating the website and exploiting other state of the art electronic media.)

3. Improve the professional development scholarship program (including breadth, accessibility, and promotion).
4. Create “targeted” professional development programs (webinars, emphasis on no-travel, low cost education, better marketing and quality).
5. Translate Business Partner participation into a more mutually beneficial relationship. (How can both the Business Partner and the average CAPPa member derive more benefit from our association?)
6. Establish budgeting of revenues and expenditures to support agreed upon initiatives while maintaining healthy reserves.

Follow-Up Action:

Specific Peer Review

Organization:

American Public Works Association

Characteristics of Success

- Leadership in education, advocacy and building better communities.
- Collaborative, communicative , knowledgeable team
- Promote professional excellence, competency and credibility
- Promote understanding of public works
- Become brand name for credible information and preferred choice for membership

Organization:
Non-Profits

(Holms, Bradford and Avalon/Anthony Kerr and Associates)

Characteristics of Success

- Compelling vision of future (branding)
- Focus on few goals achievability with excellence
- Exciting programs
- Dependable income
- Tenacity of purpose
- Continuity of strong leadership effective process for identifying and selecting leadership)
- Facing and anticipating threats to viability (leadership/ strategic focus)

Organization:
International City Manager's Association

Characteristics of Success

- Exploit technology for analysis and dissemination of massive quantities of information.
- Work collaboratively across boundaries.
- Move beyond traditional assumptions and solutions.
- Help members to build sustainable communities.
- Promote sound stewardship of community resources.
- Serve as a source of personal support and renewal throughout member's life in public service.



Organization:
ERAPPA

Characteristics of Success

- Preferred source for learning, career development and development
- Provide excellent education programs
- Promote Diversity in Leadership and Membership
- Develop strategic alliances with business partners and others
- Promote sustainability
- Recognize economic climate and plan for the future

Organization:
NACUBO

Characteristics of Success

- Advance economic viability and business practices of higher education
- Be the thought leader and authoritative resource for members
- Provide broader access to professional development offerings
- Broaden collaboration efforts
- Develop Research capability and credibility
- Prepare members for the future

Organization:
Girl Scouts of America

Characteristics of Success

- Improve program excellence
- Increase volunteerism
- Build stronger brand
- Solidify funding
- Strengthen organizational structure and governance (leadership)

Organization:
ASHRAE

Characteristics of Success

- Advance art and science of HVAC for the benefit of society
- Advance art and science of HVAC to create a more sustainable world
- Be the foremost source of technical and educational information
- Be the primary provider of opportunity for professional growth
- Extraordinary service to our members
- Program excellence

Organization:
Boy Scouts of America

Characteristics of Success

- Identify and strengthen relationships
- Put right people in right positions
- Recruit more volunteers
- Increase membership opportunities
- Ensure financial security
- Prepare members to meet current and future challenges