



January 31, 2009

Dear Strategic Focus Session participant:

Enclosed you will find a distillation of the issues and suggested Goals and Action Steps which we produced during our meeting. Please look them over for any additions or corrections you think might be needed. Then keep them for your reference.

If you need the information from any of the other flip charts or any other assistance, please feel free to call us at Executive Consultants' Network.

The success of our work together has two measures. The first is the result of our survey taken at the end of our session:

Not Satisfied 1 - 2 - 3 - 4 - 5 Very Satisfied

1. The day overall	4.7
2. Your needs being met.	4.6
3. The communication within the group.	4.6
4. The meeting flow and process.	4.6
5. The facilitator	4.8

The second measure of success will be your work together in the next 3 years.

Once again, it was a pleasure working with you. I hope we can work together again in the future!

Sincerely,

Ray Dupont

2004-2007 GOAL EVALUATION

Improve membership quality, diversity & involvement

2009 grades- D,D,C-,D

- 400 members
- Retention rate of 90-95%
- More student involvement
- Scholarship awards to \$15K annually

Promote our educational opportunities

2009 grades- C,B-,C+,C

- Certification as way to improve
- Have highest % of certified members
- 50% of members for CDT- double other certifications
- Improve electronic offerings to members & non
- Leadership training

Sustain/ improve our long-range fiscal position

2009 grades- B/C,D,D,F

- New revenue opportunity
- Create long-term financial plan

Create & implement a PR/ marketing effort

2009 grades- B,C,D,F

- Have all meetings, new members, awards published in industry & local publications
- Improve national CSI image
- Make our student award the national standard
- Create distinguishing identity- become model chapter

CRITICAL ISSUES 2009

- Maintain membership-4/4 groups
- Marketing- 3
- Increasing membership diversity- 2
- Financial viability- maintain or grow existing potentials- 2
- Maintain relevance- 2
- Scholarships- 1
- Ensure success- BIM, Green- 1
- Increase student membership- 1
- Creating CDT as educational curriculum item- 1
- Leadership education- 1
- Improve visibility- industry & Certification-1
- Keeping current- maintain focus on sending out info- 1
- Focus on policies & bylaws- national level to chapter- 1

AREAS FOR IMPROVEMENT 2009-2012

- Marketing- What is our brand?, marketing intern
- Membership diversity- relevance, visibility
 Maintain membership- recover past members
- Education- CDT, Leadership education
- Maintain financial viability

GOALS & ACTION STEPS 2009-2012

Twice a year all goal progress will be reviewed by the President & all Board members

Grow/ develop membership

Issues

- Economy
- Diversity- get contractors & engineers
- Retain/ recover past members
- Make participation meaningful/ valuable
- Mentoring
- Showing CSI expertise to industry
- Increase membership value (CEUs)

Solutions

- Create/ develop mentoring program
- Present at industry group meetings/ be more visibly involved in organizations- be experts
- Promote educational programs locally (marketing)
- Ensuring programs meet all member needs- more diverse programs, focus program committee on needs
- Follow-ups on interested non-members/ non-participating members
- Make new member orientation more interesting (Q/A format)
- Continuity in Membership Committee chair

Action Steps

- Provide good/ diverse education programs & promote them by Programs Committee Chair- Blake
- Development of a Membership program/ framework that can be followed by changing leaders (playbook) by Membership Committee/ Board

Focus education on leadership, certification and delivery methods

Issues

- Seminars pertinent to more groups
- Internal & external leadership
- Outside of seminars
- Newsletter- external education
- Sell the Convention- both membership & outside seminars
- Certification- continue to grow- IFMA, ABC, ICA (AGC)
- Staying current or ahead of change- BIM, Omni format, Unifomat

Solutions

- Convention- phone tree
- Meeting programs
- Seminars- technology instead of traveling
- Increase awareness of certification
- IUPUI & ITT curriculum

Action Steps

- Present monthly programs on education topics by Ivette R-B
- Make presentations to local firms & educators (design & construction) by Henry S.
- Develop leadership (local chapter) through education by Mike M.

Increase revenues

CSI

STRATEGIC FOCUS SESSION – JANUARY 31, 2009

Issues

- Maintaining current revenue stream
- Creating divergent revenue opportunities
- Creating a long-term solution to organization of educational trust
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Solutions

- Maintaining Trade Show & Golf Outing
- Charging more for study of CDT & exam sessions
- Creating a long-term financial plan (look at historical data)
- Asking for donations to the chapter- formula for estate planning going to CSI
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Action Steps

- Remove Golf Tournament funds from Trust revenues
- Look at ways to donate funds to Chapter and/or Trust
- Recruiting an estate planner for expertise
- Resolving legalities of the Trust

Champion: Kathy Bultman with Committee help (Chris McComas & Kristin W. could help)

Develop & implement a marketing strategy

Issues

CSI

STRATEGIC FOCUS SESSION – JANUARY 31, 2009

- Getting information out
- Fresh image- what is our brand?
- CSI- go to group for construction/ design
- Strategy to increase & use our database
- Cross-market with other groups
- Change with BIM, Green, IPD
- Generation issue?

Solutions

- PR Committee
- Revamp website with links-Not solely dependent, face-to-face/ trade shows, other publications- WFMS/IBJ/STAR
- Continue participation in other organizations
- Incorporate our lists to use for other events
- Develop our brand- value propositions
- Define our audience
- Position ourselves for newer generation
- Change- keep moving the cheese

Action Steps

- Define brand
- Create process for Committee coordination
- Publicize our activities & educate construction industry
- Cyclical review process- semi-annual

All by Blake Wagner