

The AIM Report: A Strategic Long-Range Plan for The American Institute of Architects

Prepared by the
Aligning the Institute for the Millennium Task Force

Adopted by the
**Board of Directors of
The American Institute of Architects**

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**THE AMERICAN INSTITUTE
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A. Preface

In June 1998, a task force was appointed to develop a strategic long-range plan for The American Institute of Architects (AIA). The 14 members of this task force, chaired by AIA Board member G. Gray Plosser Jr., FAIA, were drawn from a number of key constituencies: AIA Associates, AIA members, the Council of Architectural Component Executives (CACE), The American Architectural Foundation, AIA national staff, the public, and the Board itself. Daly Strategic Directions provided process design and facilitation.

The charge given to the Aligning the Institute for the Millennium (AIM) Task Force was to challenge comfortable assumptions in order to look into the future for where the profession will be or needs to be, and to determine how the Institute can best support the growth and success of the profession. The AIM planning process required an inclusive approach with a broad range of perspectives and expertise gathered and studied.

The AIM Task Force purposefully began with an unobstructed view, without boundaries of current missions and goals. The goal was to freely examine where the organization needs to focus over the next several years. More than 15 separate data sources were used covering a broad range of subjects including architecture education, present and potential sources of competition, client perceptions, and AIA member expectations.

The process provided numerous opportunities for participation and review by members of CACE, national staff, the members, and the Board itself. In the early phase of information gathering, the Board provided valuable data at its fall 1998 meeting in Toronto. At the February 1999 Grassroots local leadership conference in Washington, both the Board and Grassroots attendees participated in workshop exercises designed to test some of the early conclusions of the AIM Task Force. In March, the Task Force delivered a preliminary report to the Board at its meeting in St. Petersburg. At that time the Board unanimously endorsed the concept of the draft report. On May 5, the Board approved the AIM final report at its meeting in Fort Worth and voted to appoint a standing AIM Committee to monitor and evaluate the implementation of the AIM Report.

B. Introduction

Aligning the Institute for the Millennium (AIM) has been a significant undertaking characterized by extensive research and information gathering from thousands of sources. It has benefited from the consistent support of the AIA's leadership and it has sought input from members, AIA staff, and the Council of Architectural Component Executives (CACE). The AIM Task Force has been keenly aware of the unique opportunity inherent in this process to shape the future health and vitality of the profession.

Why does it matter that our profession be healthy and vital? Because architects have much to contribute to the quality of people's lives and the productivity of our economy; because a healthy profession means prosperity for its practitioners; because the profession must attract and retain intelligent and motivated people; and because a healthy profession can advocate its interests and message to the public. The AIA is the only instrument that can effectively and with forethought influence the future shape of the profession. Many outside variables will have a profound and often confounding impact on our future. The AIA, representing the majority of practicing architects, is uniquely positioned to be a catalyst for positive change. This report, this plan, embodies and advances recommendations that together form the means to a more successful and influential profession.

If the AIA is to be that effective instrument of change, there are several key factors that will influence success. They are:

Leadership and vision

Cultural transformation

Accountability and responsibility

Inclusiveness

Access to knowledge and the application of technology

Influence and engagement

The appropriate structure to support change.

These factors permeate the recommendations and objectives advanced in this document. Without careful attention to these key success factors, the plan will not bear fruit. They are interdependent and they are change-oriented. Each represents a need to do things differently from how we have acted in the past.

Leadership is the fundamental success variable. We must promote better and more consistent leadership both in our elected representatives and our staff. The culture of the AIA must move from one of conservation to transformation, embracing innovation and speed. Our leaders and our Institute must be accountable for results. Our mindset must shift from territoriality to inclusiveness. We must treat knowledge as our primary currency and technology as the vehicle for its distribution. We must be relentless in seeking to influence and engage with the marketplace. And we must change our structure as necessary to enhance our vision, promote our strategies, and insure the very best leadership. These success factors were uppermost as the Task Force examined the AIA's Mission Statement.

The current AIA Mission Statement has served well for many years. Nevertheless, the Task Force has recommended that a new one be adopted. Simplicity and focus characterize it. It is powerful and directive in its content, broad and expansive in its scope. It is a yardstick against which to measure our performance.

The American Institute of Architects is the voice of the architecture profession dedicated to:

Serving its members

Advancing their value

Improving the quality of the built environment.

As the objectives of the plan were debated and refined, this Mission Statement was a touchstone for evaluating their validity and focus.

The Task Force also committed early on to the development of a "Vision Statement," a tool not heretofore part of the AIA lexicon. While the AIA's most recent long-range plan, Vision 2000, attempted to confront the future trends of our society, it did not spell out what kind of organization the Institute should become, it did not point to a desired future. The Task Force again elected to struggle with developing such a statement of future purpose under the

premise that achieving the objectives requires a different state of being for the Institute than now exists. This is an important concept, for it drives the belief that a plan is only as good as its capacity for transformation of the organization.

Through a culture of innovation, The American Institute of Architects empowers its members and inspires creation of a better built environment.

The Vision is very different from the Mission in that it describes an organization that is an enabler and a leader for the profession, not just a purveyor of programs and services. It suggests that through achievement of the Objectives, the AIA will itself be transformed along with its members. To paraphrase a former AIA public director, it is about *becoming the message*.

Perhaps one of the most profound exercises in this process was the identification of stakeholders. The result was consistent with the research. The AIA has many stakeholders who are not members but who exist within our sphere of influence and have much to contribute to the achievement of the mission and vision. Moreover, some of those stakeholders are already members but whose interests and needs have been ignored. The realization, which slowly settled over the Task Force, was that we have spent much energy, money, and time thinking and acting *restrictively* about our profession and our organization. The Task Force concluded that although we must always put our members' interests first, we must be open to redefining membership from the universe of our stakeholders. Perhaps the most compelling and immediate example is the firm. Owned and managed by members, its needs are different from those of individual members. The AIA has not focused on this fact or its financial implications. In short, we must become more inclusive as we plan for the future.

The plan is not complete. It requires the development of specific strategies to achieve those objectives over time. The "construction documents phase" will require the dedicated work of the staff and leadership of the Institute. God is indeed in the details and the development and execution of those strategies annually through the program and budget process must be consistent and inspired by bold leadership.

The inspiration for the Task Force and the process in many ways has been Ernie Boyer, coauthor of *Building Community: A New Future for Architecture Education and Practice*. This is a plan for renewal, not just of the AIA, but also of the process of becoming and remaining an architect, a professional. It is about becoming more client-centered, it is about broadening the

horizons of architecture, and it is about raising the expectations of the public for architecture of quality.

G. Gray Plosser Jr., FAIA
Chairman

C. Executive Summary

The Aligning the Institute for the Millennium (AIM) strategic long-range planning report answers two questions fundamental to the future of the AIA: Why does The American Institute of Architects exist and what do its members want it to be? The answers to those questions are offered in this report under the headings “Mission” and “Vision.” The report identifies seven major themes or Objectives, which are offered as the most important areas that must be addressed if the AIA is to fulfill its Mission and to achieve its Vision. Under each of the seven Objectives, the AIM report spells out a series of issues, which are offered as suggestions or illustrations to help guide those charged with developing strategies and tactics to address the Objectives. This report affirms a set of essential beliefs or “Core Values” that should guide the AIA. It identifies those individuals, organizations, and groups whose interests are realized through contact with the AIA. These appear in the section of the report titled “Stakeholders.” The Appendices summarize the AIM planning process and data highlights developed by the AIM research.

D. Mission Statement

The Mission Statement answers the most fundamental question: “Why does the AIA exist?” It is short enough to be easily remembered and clear enough to stand alone. All policies, programs, communications, and actions of the AIA should be reviewed for alignment with the Mission.

The AIA’s current mission, its five “Objects,” is nearly 100 years old. Venerable, yes, but also resoundingly unfamiliar to most AIA members. What is unfamiliar to the members is invisible to all those with whom the Institute and its members relate, most especially the public. Unanimous in their belief that the existing AIA Mission no longer communicates why the AIA exists, the Task Force recommends a new Mission Statement:

The American Institute of Architects is the voice of the architecture profession dedicated to:

Serving its members

Advancing their value

Improving the quality of the built environment.

That is, the AIA serves architects and their clients by promoting ethical, educational, and practice standards for the profession and by advocating excellence in design, defined here but not restricted to aesthetics, functionality, constructability, and cost effectiveness. In short, to paraphrase the design trinity identified two millennia ago by Vitruvius: firmness, commodity, and affordable delight.

E. Vision Statement

The Vision Statement answers a fundamental question: “What do we want the AIA to become?” The Vision communicates where the AIA will focus, emphasize, and measure. It is the AIA speaking to itself about the mandates for a successful future. It stands as a beacon to guide members into the 21st century as innovative leaders for change.

Agreeing on a Vision Statement was one of the most difficult assignments addressed by members of the Task Force. It sparked much debate. But the Task Force concluded that without a Vision that enabled a culture of transformation, the Objectives would at best be just more of the same.

The Vision Statement that was ultimately written is informed by key words and phrases that repeatedly came up in discussion: “leading force,” “essential resource,” “livable communities,” “better serves the public’s needs,” “design,” “promote,” “seek,” “celebrate.” Although none of these words or phrases appears in the statement that was adopted, they live just below the surface and animate the intent of the Task Force:

Through a Culture of Innovation, The American Institute of Architects Empowers Its Members and Inspires Creation of a Better Built Environment.

The implication of this Vision should be clear: Based on its research, the AIM Task Force came to the conclusion that currently the AIA does not consistently embody a culture of innovation. Only such a cultural transformation will lead to the conditions that will equip its members with the best and most appropriate tools to address one of the great challenges facing architects in the 21st century; that is, to redefine the boundaries of the profession.

F. Core Values

Research reveals that architects are held in high regard in a number of critical areas that directly affect how they engage with their clients. The commitment and ability to deliver design excellence, for example, and the expectation of ethical behavior were consistently cited as real strengths.

The Task Force was also struck by expectations clients, the public, and, indeed, the profession had of itself that were not always fulfilled. An attitude of inclusiveness and a commitment to collaboration, to offer two examples, were less frequently counted among the profession's strengths.

Based on what it heard and based on their own experience, the AIM Task Force identified seven Core Values the world expects of the profession and what the profession has a right to expect from all levels of the organization that aspires to be a credible and effective voice.

The AIM Task Force defined "Core Values" as enduring beliefs. The Core Values are what we *believe*, what we strive to embody in the ways in which we relate to our members and in the ways our members make their contribution to one another, their clients, and the society they serve. Our Core Values are essential guiding principles. They should permeate everything we do and represent.

The following Core Values confirmed by the Task Force are not listed in any order of priority, but are offered with the recognition that together they are part of an integrated, seamless web. They are the bone and sinew of our credibility and reputation:

Leadership

Design Excellence

Life-long Learning

Ethical Behavior

Inclusiveness

Collaboration

Client- and Member-Centered Service.

G. Stakeholders

“Stakeholders” are those individuals, organizations, and groups whose interests are realized through contact with the AIA, and who are relevant to the fulfillment of the AIA’s Mission. The word “stakeholder” does not necessarily suggest a membership category within the AIA. Nor does it necessarily imply the right to use “AIA” as a designation.

The delivery systems for distributing various levels of service to stakeholders include the important work of the AIA’s national staff, the AIA’s state and local components, and other organizations relevant to the AIA’s Mission and Vision. The goal for delivery of service to stakeholders is, ultimately, to better serve the profession’s clients and society at large.

The AIM Task Force identified the following Stakeholders who are most directly part of and contribute to the gravitational field of the AIA’s universe:

Individual members who are licensed architects in practice

Firms with members as principals

The AIA’s components

Licensed architects in corporate careers, education, government, etc.

Architectural graduates on a practice track

Architectural graduates not on a practice track

Students in architectural degree programs

Individuals trained in other disciplines working in an architectural firm

Affiliates, who are members of the design/construction team

Allies, who provide goods and services that support the design/construction team.

The public as a stakeholder is more complex matter. At the national level, it is The American Architectural Foundation that is specifically charged with the responsibility of developing programs, products, and services that engage the public. But at the local and state levels, the

components have a major responsibility to facilitate a mutually beneficial relationship between the public and AIA members.

H. Major Objectives Summarized

Architecture Education

Partner with collaterals to provide students of professional degree programs in architecture shared practical experience and a knowledge of professional culture that will prepare them upon graduation to become architects in expanding and diverse practice settings.

Information and Knowledge Delivery

Identify and provide market-driven, timely, relevant, concise, and accessible information and knowledge, using all appropriate delivery systems.

External Dialogue

Seek opportunities and create mechanisms to foster dialogue that engages the architect with the marketplace.

Partners

Identify, promote, and enhance strategic partnerships between members, their clients, and other contributors to the built environment.

Advocacy

Initiate and enable results-oriented advocacy with government *and* industry at the state, local, and national levels, speaking with a clear, consistent voice.

Inclusiveness

Aggressively work to broaden the definition of the profession, while being more inclusive, and focus services to anticipate and creatively respond to member needs.

Governance

Transform the culture, structure, and resources of the Institute to facilitate the bold implementation of policies that support the Mission and Vision Statements, and provide more timely, consistent, and innovative responses to emerging issues.

I. Major Objectives: Issues for Action

There is a great deal of overlap among the seven Objectives identified in the AIM Report. The overlap is both inevitable and desirable. Like the keys of a piano, when one is struck, the others in the vicinity will resonate. Developing a client-centered attitude resonates strongly with the first Objective; it also does with Objectives Two and Three. Rising to the challenge of advocacy posed in Objective Five will be shaped by who belongs to the AIA – Objective Six – and with whom the AIA chooses to develop mutually beneficial relationships – Objective Four. The contrary likewise holds: If the AIA does not step up to the challenge of any one of these Objectives, the effectiveness of the response to the others will be diminished. They are that interrelated, not because the AIM Report says so, but because the research that went into writing this report supports this conclusion.

The AIM Task Force recognized it was not their responsibility to offer strategies or tactics for implementation. At the national level, that task belongs to the Institute's staff. At the state and local levels, it is the responsibility of those most familiar with the challenges and opportunities in their components. A conspicuous example of how these responsibilities might differ is public education and outreach, which at the national level is the responsibility of The American Architectural Foundation, but locally is carried on by the components. What the AIM Report does offer is a template for coordinated planning that will ensure both timeliness of response and continuity of effort *throughout* the AIA. To facilitate this effort, the members of the Task Force realized they had a responsibility to help guide those who will ultimately develop the programs and services that address the intent of each Objective. Therefore, this report offers for consideration a number of issues under each Objective.

Several caveats are in order. First, the issues that have been identified tend to have a national bias. When the AIM Report is used for planning purposes at the component level, the issues will most likely be different. Local leadership is thus challenged to respond to the Objectives in ways clearly relevant to their particular circumstances. Further, the issues that appear in this report are a snapshot of the thinking of the AIM Task Force at the time the report was being written. They should be regarded in many instances not as the final word, but, rather, as incentives for further discussion. In addition, the Task Force does not intend to suggest the AIA is not already addressing some of the issues they identified, often effectively. Where there is an alignment between an issue and an existing initiative, the AIM Report should be read as an endorsement of action that is under way.

In the broadest sense, the issues identified under each Objective do two things: They serve to illuminate the spirit of a particular Objective and they suggest opportunities at the national level for effective action as well as desired states toward which the Institute and the profession should strive. They are pressure points at which AIA staff and the elected leadership can take the pulse to determine how well the Institute is serving its members. They are also signposts that point to accountability. Again, local and state components are encouraged to identify those issues most pertinent to each Objective at their level.

In whatever ways the AIA bridges the gulf between “what it does now” and what the Task Force believes “should be done in the future,” this much is clear: The elected leadership at every level and the staff must act aggressively and collaboratively. Through a deep commitment to a culture of innovation, each must be driven by the kind of passion that can come only from a dedication to the success of America’s architects and the knowledge that there is no better time than right now to work toward that success.

1. ARCHITECTURE EDUCATION:

Partner with collaterals to provide students of professional degree programs in architecture shared practical experience and a knowledge of professional culture that will prepare them upon graduation to become architects in expanding and diverse practice settings.

Overview: The education of architects is the single most important investment the profession makes in its own future. How wisely that investment is made determines the profession's health and vitality. It determines as well the ability of architects to serve the changing needs of their clients and the general public. Education is both an act of stewardship of the profession's legacy and a unique opportunity for innovation and revitalization. Education is what ensures continuity and enables positive change.

The environment in which the AIM Task Force researched, discussed, and debated this topic was colored by a number of issues and observations:

There often appears to be a disconnect between formal education and the diverse practice settings students experience upon graduation.

Many in the profession have a low self esteem, which affects how they work with others and how they value their time.

The period between graduation and licensure is by most accounts unnecessarily painful, alienating, and unrewarding.

All too often, the young men and women who stand at the threshold of their professional careers lack the ability to speak a language that will engage future clients as well as the general public.

Permeating the discussion of these issues was a prevailing dissatisfaction among the AIM Task Force members with the way in which the AIA had dealt in its recent past with education issues. They pointed to a persistent lack of clarity as to exactly what policies and initiatives the AIA stood for. Absent such clarity, they argued, the AIA has all too often been hobbled in taking up its responsibilities as one of the key stakeholders in the education process. As the voice of the profession, the AIA has a responsibility to its members and future generations

to ensure that graduates of architecture degree programs will experience the “seamless transition” between the classroom and the workplace envisioned by the late Dr. Ernest Boyer.

To approach the preferred future envisioned by Dr. Boyer and this Objective, the AIA must communicate in the clearest way its intention to work collaboratively. From there, the AIA must define and then embrace its unique responsibilities in this critical process. The following suggested tactics suggest how the AIA might proceed:

Advocate making graduates of accredited programs eligible to take and prepared to pass the Architecture Registration Exam (ARE) upon graduation.

Track ARE pass/fail rates by school.

Encourage partnerships between practicing architects and those responsible for architecture education that reinforce traditions of sharing practice experience, mentoring, and lifelong learning.

2. ***KNOWLEDGE DELIVERY:***

Identify and provide market-driven, timely, relevant, reliable, concise, and accessible information and knowledge, using all appropriate delivery systems.

Overview: Knowledge is the currency of the 21st century; knowledge is its gold. As the computer chip has accelerated the rate at which new information about the building industry has grown, architects need to have easy, quick access to reliable knowledge. To use a sports metaphor adopted by the Task Force, it's not good enough for the profession to know where the puck is now; architects need to be able to anticipate where the puck will be. The AIA should be the eyes and ears of the profession. Its perspective should be global and there should be evidence of a strong commitment to delivering knowledge-based programs and services that are easily accessible, timely, and of value to a profession whose practice methods are daily becoming more diverse. Making good on such a commitment has obvious implications for the AIA's effectiveness in the arena of life-long learning.

This Objective is not just about delivery systems. It is about content. "Market-driven" speaks clearly about the type of information that is required. It also speaks to the opportunity the AIA has on behalf of the profession to analyze, evaluate, and distill that information into the kind of reliable knowledge that gives architects what they *need* to know to serve their clients. It is about ease and seamless access in acquiring that knowledge. It is about partnering with AIA components, industry, and research organizations in addition to acquiring, packaging, and delivering information derived from the initiatives outlined in Objectives 3 and 4.

Position the AIA to be the .COM of knowledge essential to the health of the design and construction industry.

Emphasize market-driven programs and information.

Cooperate with the AIA's components to develop content about the marketplace and deliver it in the most cost-effective manner.

Pioneer new programs that identify and promote new markets and the tools to serve them.

Emphasize technology-driven solutions to the challenge of information and knowledge delivery.

3. ***EXTERNAL DIALOGUE:***

Seek opportunities and create mechanisms to foster dialogue that engages the Architect with the marketplace.

Overview: The previous Objective focused fundamentally on the challenge of identifying and delivering information and knowledge. A complementary challenge has to do with the pursuit of a healthy dialogue with the marketplace. In the words of Ernest Boyer, the goal of the profession must be engagement. Such engagement is distinguished by two traits: A commitment to be a good listener and the use of the language spoken by those with whom one wishes to be engaged—clients and the public. The Task Force heard in its research that all too often architects seek engagement on their terms. Too often the result is impenetrable professional jargon. As the voice of the profession, the AIA has a particular responsibility to help shape the language architects use so that the profession is more easily understood by those with whom they speak whether clients, users, or stakeholders identified by this report. It has a similar responsibility at all levels to pursue on behalf of its members opportunities for engagement.

Promote the use of the PIAs as an essential tool in fostering communications with specific segments of the marketplace.

Create a formal structure within the AIA that insures that information captured through marketplace dialogue informs knowledge delivery to members.

Establish new and formal mechanisms to foster dialogue with organizations and associations and promote the AIA as a major resource.

Create and pursue opportunities to listen to clients.

4. ***PARTNERS:***

Identify, promote, and enhance strategic partnerships between members, their clients, and other contributors to the built environment.

Overview: The research that shaped this Objective kept returning to two facts of modern practice: Architecture is a team endeavor and, in relative terms, the profession is rather small. These two conditions of practice argue the importance of being open to alliances with others when there is a shared interest or need. Such alliances are the essence of a strategic partnership.

The issues identified by this Objective also touch on the question of attitude raised by the first Objective as well as Objective 6, which deals with inclusiveness. Objective 4 responds to a paradox: Although it is in the best interests of the profession to form strategic partnerships both inside and beyond the design and construction industry, the profession and the Institute are not consistently committed to being a true partner. This is a widely held perception. Yet the reality of modern practice is that fluid, dynamic partnering is the way of conducting business in the post-Industrial society. This Objective confronts this negative perception and commits the AIA to a better, more effective way of working with the design team.

One of the most obvious areas where the intent of this Objective could be applied is in the AIA documents. Too often clients perceive that AIA documents do not adequately reflect their interests. Creating a more structured, mutually beneficial partnership with clients that address this issue is consistent with the spirit of Objective 4. Other examples include:

Support and foster attitudinal change among members to aggressively seek and develop mutually beneficial partnering strategies with their clients and industry colleagues both individually and through their professional and trade organizations.

Link members with public and private sector organizations and associations where interests overlap (though not necessarily coincide) with those of the AIA.

Incorporate targeted stakeholders as partners to capture critical information about the marketplace and to promote the AIA and its members.

Establish criteria and guidelines for partnerships consistent with the overall Mission, Vision, and Objectives of the AIM plan.

5. **ADVOCACY:**

Initiate and enable results-oriented advocacy with government *and* industry at the state, local, and national levels, speaking with a clear, consistent voice.

Overview: This Objective speaks directly to what it means to be the “voice of the profession.” It requires that the AIA develop clear statements of what needs to be said in whatever venue it is called upon to speak on the profession’s behalf. Objective 5 embraces such related issues as credibility, clout, and access. It also means knowing where the action is, which more often than not happens at the state and local levels. This Objective also points to the need to achieve a better balance in addressing the private and government sectors. And it acknowledges the need to so structure the organization that it speaks clearly, forcefully, and with one voice.

Provide the appropriate resources to enable elected leaders to be effective advocates for the AIA’s policies and positions.

Place special emphasis on cultivating working relationships with legislators and government officials in trend states.

Strengthen those communications to the mainstream media that celebrate the value of architects and architecture. This will require being clear about the messages to be communicated.

Become a clearinghouse at the local and state levels for trends and success stories about the profession and its work and aggressively disseminate such information among the components.

Make architecture a continual and significant part of the agendas of industry and public interest groups such as the U.S. Conference of Mayors, the National Trust for Historic Preservation, the Urban Land Institute, Common Cause, and others.

6. ***INCLUSIVENESS:***

Aggressively work to broaden the definition of the profession, while being more inclusive, and focus services to anticipate and creatively respond to member needs.

Overview: The definition of the profession is expanding. Students being graduated with degrees in architecture are applying their training in new ways. Both facts of modern practice constitute an opportunity for the profession to have a greater impact on society and the built environment. However, many of these architects do not feel an affiliation with their profession nor do they see a home or forum for their interests in the AIA. The challenge for the AIA is to adopt an inclusive and welcoming attitude if this organization is truly to live up to its claim to be “the voice of the profession.” Objective 6 also confronts the matter of diversity: The AIA and the profession are not a mirror of society; yet both serve that society. The Task Force does not believe an attitude of exclusivity contributes to the quest for a better, more humane environment.

Promote entry into the architecture profession to all members of society.

Collaborate with the components to deliver products and services that meet the needs of an expanding profession.

Redefine membership categories so that the level of service is commensurate with the services needed.

Encourage a culture of openness, welcoming both those members who currently may feel alienated, such as associates, as well as those who apply their training as architects in fields other than traditional practice.

Evaluate and redefine nonmember access to member benefits and services commensurate with the value of membership.

Begin the process of affiliation in the schools of architecture.

7. **GOVERNANCE:**

Transform the culture, structure, and resources of the Institute to facilitate the bold implementation of policies that support the Mission and Vision Statements and provide more timely, consistent, and innovative responses to emerging issues.

Overview: Structure either inhibits or enhances a culture of innovation. If leadership is the key to achieving a transformed AIA, then the structure should promote the election and hiring of capable and forward-thinking leaders who are committed to this transformation. If it does not, the remedy is clear: Better align the structure to facilitate what we want to become. Accountable leadership is key to achieving this. Currently, we are status quo, more occupied with protecting turf. This is not a transformation that is likely to be member driven, but, rather, will flow from inspired leadership.

Use the AIM report as a tool to develop accountable leadership.

Document the transformation process with a credible method of benchmarking and monitoring.

Align the policy structure of the AIA with the AIM Vision.

Ensure that staff at all levels develop programs and budgets that are AIM-accountable.

Consider new models of governance from components and other relevant sources.

Improve the alignment of the three-tiered structure to recognize the components' roles as stakeholders and service providers.

J. Recommendations for Implementation

In the course of its work, the Task Force was reminded of President Eisenhower's words that it is the act of planning rather than the plan itself which typically is the most important outcome of any planning process. This recommendation seeks to institutionalize the AIM strategic planning process as an ongoing activity and responsibility of the AIA.

The Task Force recommends that the AIA president acting on behalf of the Board assign to an AIM Monitoring Task Force the responsibility for monitoring the development and implementation of the strategic plan. On an annual basis this task force will oversee ongoing scanning of the data shaping the profession and, with this in hand, revisit the assumptions of the current plan. This task force will focus on:

Visioning: The task force will not be the source of the information, but rather the holding place. This could entail forming a standing group of experts or visionaries who would feed new data to the AIM Monitoring Task Force on a regular basis.

Monitoring: The task force will oversee the annual implementation of the strategies developed in response to the AIM plan. Working in partnership with the Institute's staff and the annually elected leadership, they will ensure that all resources and activities are responsive to the seven AIM Objectives.

Reporting: The task force will report to the Board and AIA members the findings of the above data gathering and monitoring. The investment of financial, program, and human resources will be measured in terms of the potential of success in implementing the AIM Objectives. This will not be pro forma action, but a means to ensure accountability.

The AIM Task Force further recommends that the strategic planning process be renewed at appropriate and predictable intervals. Recognizing that this current effort has taken almost a year, the process should begin anew every three to four years. It would be conducted by a group other than the AIM Monitoring Task Force.

The AIM Task Force asks that the AIA Board and those given the responsibility of monitoring the progress of the AIM Report refer to the members on the original Task Force. Such guidance will help maintain the focus and sense of urgency integral to the successful realization of the Objectives of this report.

K. Appendices

1. The AIM Planning Process

The AIM Task Force examined and identified the following as key elements of the Plan:

- A. **External Forces** – Significant events or issues that can shape or influence the environment in which the profession and the AIA are likely to operate in the years ahead, such as issues related to the economy, education, societal trends, technology, legislative/regulatory, global, professional trends, and competition/alliances.
- B. **Stakeholder Identification** – Those individuals, organizations, and groups whose interests are realized through contact with the AIA, and who are relevant to the fulfillment of the AIA’s Mission. The word “stakeholder” does not necessarily mean a membership category within the AIA, and the new definition of membership does not automatically imply the right to use “AIA” as a designation.
- C. **Core Values** – Essential and enduring beliefs for the AIA and its members. Core Values permeate throughout activities and messages as essential guiding principles, practices, and behaviors.
- D. **Internal Forces** – Strengths of the AIA that should be drawn upon, leveraged, and carried forth as core capabilities that are most important, relevant, and supportive of the future AIA.
- E. **Critical Themes** – Issues that either repeatedly surfaced as critical to the future or were profound in their effect on the future.
- F. **Mission** – Why does the AIA exist, and for whom?
- G. **Vision** – Where does the AIA want to be; what are its priorities in the years ahead?
- H. **Objectives** – What do we need to focus on and do to accomplish the Mission and Vision; in broad, yet clear terms?
- I. **Implementation Guidelines** – Who is responsible for implementing the Strategic Plan? What is the ongoing process for planning, measuring, and reporting?

Timetable and Process Steps:

1. AIM Task Force Members Appointed – June 1998
2. Presentation to Executive Committee on AIM Progress – August 1998
3. Presentation to CACE Executives on AIM Progress – August 1998
4. Fax Back Survey to Members for Grassroots Input – August 1998
5. First AIM Task Force Meeting – September 1998
6. Communications Begin in *AIArchitect*, AIAOnline – September 1998
7. AIA Board Meeting Focus Group – September 1998
8. Focus Groups with CACE, AIA Staff, and Members – October 1998
9. Competitive Intelligence Study – Fall 1998
10. Interviews with Industry Experts – Fall 1998
11. Presentation of Progress to the AIA Board – December 1998
12. Large-Firm Roundtable Leadership Meeting – December 1998
13. AIM Planning Retreat I – December 1998
14. Grassroots Leadership Congress, 14 Breakout Sessions – February 1999
15. AIM Planning Retreat II – February 1999
16. Presentation of Progress to the AIA Board, with Endorsement – March 1999
17. Meeting with Senior AIA Staff & CACE Representatives – April 1999
18. AIM Task Force Strategy Meeting – April 1999
19. Distribute Strategic Long-Range Plan Report to AIA Board – April 1999
20. AIA Board of Directors Action on AIM Report – May 1999
21. Tactical Implementation and Budget Planning – Summer 1999, and annual process thereafter
22. Communications Continue in *AIArchitect*, AIAOnline

2. AIM Data Highlights

The process of assessing opportunities and threats in the world in which we operate is termed *environmental scanning*. A broad range of perspectives was gathered in different forms to allow the Task Force to challenge assumptions and validate key trends or themes. The AIM Task Force accessed existing AIA data and commissioned new data collection where necessary. The list of data sources for the Environmental Scanning process follows:

- A. AIM Fax-Back Survey to a geographical random sample of members, 560 responses; plus 29 Board members, August 1998
- B. AIM Focus Groups involving 14 CACE executives, 7 professional practice members, 40 Directors from the AIA Board, and 40 national AIA staff, October 1998
- C. AIM Competitive Intelligence Study for the AIA and the profession, with interviews conducted with other associations, members, nonmembers, clients, and staff, Fall 1998
- D. AIM Expert Interviews, including a GSA commissioner, a Disney Imagineering architect, a design-build firm, public works & planning architects, an architecture school dean, environmental and corporate architects, and a past CEO of the AIA, Fall 1998
- E. Large-Firm Roundtable Leadership Interviews, December 1998
- F. Advertising Focus Group Results, 1997
- G. Allegiance Survey Results, 1994
- H. Boyer Report and summary articles
- I. AIA Economist Reports and articles
- J. Membership Task Force Survey Results, 1997
- K. Assessment of Architects Report, Roper, 1993
- L. Executive Management Committee on External Forces, June 1998
- M. Redefinition of the Profession, 1996

N. Expanding Architecture Services, 1995

O. AIA Local and State Component Strategic Plans shared with AIM

The **AIM Fax-Back Survey** included 12 questions and informed the Task Force on key concerns and trends among a sample of grassroots membership. For example, keeping staff current with the latest technology challenged 58 percent of respondents, and 74 percent prefer the U.S. mail as the medium to receive AIA information. Fifty-eight percent of respondents believe the public does not understand the influence of design on their quality of life.

The **AIM Focus Groups** were conducted for approximately one-half day each, using groupware technology for anonymous and simultaneous responses, along with instant record keeping. Six sessions, with a total of 101 participants, were conducted. External and internal forces were explored, along with competition and strategic alliances. The documentation from the sessions resulted in 166 pages of key insights, with a diverse range of priorities. Issues of critical importance to the profession included expanding service through enhanced technology, the changing economy, education/training, and visibility/value in the market-place. Top issues for the AIA over the next few years included communication with members, young/future architects, components, internal technology and the AIA's Web site, and the image/PR/marketing of the association.

The **AIM Competitive Intelligence (CI) Study** was conducted by Fuld & Co., Cambridge, Mass. The purpose was to surface trends from current and emerging players in the field of architecture services and in associations providing member services to these players, using an objective third party to conduct the CI Study. Themes emerged, such as: clients are increasingly looking for business-based partners to achieve their design and construction goals and desire a qualified integrated team to work together on their behalf. An adjustment in the attitude portrayed by the profession is necessary through improvements in communication, listening, and team performance. Risk aversion should be enlightened through improved risk management. Architects will increasingly be employed in nontraditional workplaces, with opportunities to use their skills in different work environments. The AIA has a competitive advantage through its grassroots capabilities found in the component network.

The **AIM Expert Interviews** were conducted in Washington, D.C., and San Francisco in fall 1998. Nine experts in design and construction, from diverse work environments were

interviewed, as reflected in the above list. The results were similar, in most regards, to the findings in the CI Study. It was deemed critical to quantify good design in economic and business terms for clients to understand the value delivered. The concept of architects as leaders and facilitators of teams, using critical thinking skills, was frequently mentioned. Improved cooperation between the schools and practice is a significant need, with formal feedback loops and accountability. Embracing and preparing for diversity by including diverse players on teams and in leadership was discussed. Global sharing and learning was explored. Balancing technology and human skills is needed. Architects working outside of traditional firms was a theme. Additionally, we must shape the perception of architects, and deliver on that performance improvement.

Members of the AIM Task Force met with the **Large-Firm Roundtable** leadership in December 1998. The market demands of large firms encourage the inclusive team approach to projects, which is reflected in the Roundtable with subgroups in Finance, Information Systems, and Human Resources. Model curriculum in the schools is a goal, with an emphasis on practical case studies and the full spectrum of practice. Other issues of importance include an outreach to the business community and government at all levels. Large firms pay a significant portion of employees' AIA dues, and new firm leadership will need to recognize the value of the Institute in continuing this practice. Large firms offer research and training information for the AIA's education programs and for international practices, and testimony credibility representing large economic constituents.

In summary, the data collection and analysis process for the AIM Task Force was an interactive learning experience. The purpose was to identify critical needs of the profession, develop agile strategies in different scenarios, and collectively forge ahead with a focused direction for long-term and most relevant responses to the needs of the profession, and, ultimately, to the needs of society.

3. The AIM Task Force

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