

Strategic Plan for IAP2 USA

Background

IAP2 is both a new and an old organization. The International Association for Public Participation originated over two decades ago in North America, comprising primarily U.S. and Canadian members. Since then, the organization grew successfully to include members from many other countries, developed key concepts and tools for the practice of public participation, and created an internationally respected certificate training program in the field of public participation, that is now offered in English, Spanish and French.

The success of IAP2 was not without its growing pains. In particular, the increasingly international focus of the organization led to a loss of momentum and focus in countries such as the U.S. where IAP2 began. It also became increasingly difficult for an administration located in one country to support and serve members around the far-flung globe. These circumstances led to a decision to create a series of national or multinational affiliates, which, while still tied to the international organization, would be in a better position both to serve their members and to focus on public participation issues peculiar to each country's laws, customs, language, and governance structure.

Assets

The elected 2011 board of the new US affiliate, IAP2 USA, met in Austin, Texas in March 2011 to develop a strategic plan for the organization's success. The strategy is designed to take advantage of and revitalize the assets that the affiliate possesses, based on the founding and strong presence of IAP2 in the U.S. since 1990. These assets include:

- Name/brand recognition based on two decades of IAP2 in the US
- Core of long-time, loyal members
- Local chapters in several states/regions of the U.S.
- Key proprietary tools developed for the field, e.g., IAP2 Core Values, IAP2 Spectrum of Public Participation, IAP2 Code of Ethics, etc.
- Cadre of US trainers licensed to deliver IAP2's signature training course in public participation
- Attractiveness to US members of affiliate's association with an international organization
- Diverse affiliations among our members, including government, industry, nonprofits, elected officials, private-sector practitioners, researchers and educators
- Similar organizational diversity of affiliate board members, as well as a balance of board members involved for almost 20 years in IAP2 International governance, and newer board members with fresh energy and enthusiasm for the affiliate's mission.

Mission

Key to establishing the mission of IAP2 USA was to examine who we serve.

Traditionally, IAP2 has provided its members with tools, supported chapters, provided guidance to elected officials and government agencies, trained practitioners in the field, and served as a resource to potential users of public participation processes. After serious discussion and reflection by the 2011 board, it became clear that IAP2 USA can and should serve the same groups going forward, BUT, given the newly-formed status of the affiliate and its financial resources, the STRATEGIC choice and direction is to develop our program of services and offerings in a PHASED fashion that prioritizes our ability to deliver based on our core assets and key supporters. Those priority targets in order are:

1. Members
2. Chapters
3. Practitioners
4. Elected officials and other “consumers”

While priority and focus will be weighted towards key service targets, the board created a leadership and management structure to support progress on multiple fronts (as referenced in the next section on Organizational Structure).

Based on the board’s discussions and decisions, the adopted Mission Statement is:

IAP2 USA advances public participation in the United States by providing its members with tools and information to conduct high-quality public participation processes and by providing government, industry, and nonprofit organizations with educational resources to increase the quality and value of their participation in such processes.

One of the reasons that IAP2 USA is in a special position to fulfill this mission – and a key differentiator between us and similar organizations – is the decision-oriented, objective-driven and values-based conceptual design for public participation that has been at the foundation of the IAP2 “approach” since the inception of the IAP2 Certificate Training course over a decade ago.

While many organizations focus on a particular technique, IAP2 has always emphasized the importance of program design and goals identification as a precursor and prerequisite for developing effective and meaningful public participation processes. IAP2 has been a leader in the field, and IAP2 USA is committed to establishing that position in the United States by being a preferred provider of the tools and concepts proven to elevate the quality and integrity of public participation.

Organizational Structure

In accordance with the board's authority under our adopted bylaws, IAP2 USA has added to the traditional list of officers the position of Chief Technology Officer (CTO).

Increasingly, providing member services and managing and delivering public participation processes rely on technological innovation and efficacy. IAP2 USA's members are "wired" to the Internet and expect sophistication and 24/7/365 access from us in that realm. From a financial standpoint, electronically delivering information, communications, and tools/products is also highly cost-effective and sustainable. As such, having a CTO as a member of the Executive Committee is considered crucial and strategic to our success.

As permitted in our adopted bylaws, the board has delegated to the Executive Committee responsibility for the routine administrative and financial management of the overall organization. The board has designated the Executive Committee to include the president, vice president, treasurer, secretary and CTO. To conduct the work of IAP2 USA, the board created committees to provide, drive and oversee the strategic initiatives and program offerings that are inherent to the mission of IAP2 USA. These committees include:

- Membership Development, to maintain and increase membership and diversity, a critical imperative for our membership-based organization
- Programs and Services, to develop, assess and manage the tools we offer members and others
- Chapter Relations, to enhance and support the symbiotic relationship between the affiliate and chapters
- Strategic Planning, to ensure strategic analysis is maintained as an ongoing function
- Strategic Advocacy, to support the field of public participation and network with similar-minded organizations
- Communications and Online Technology, to provide an ongoing focus on this key component of service delivery and member satisfaction

Each committee is chaired by a different board member. To increase the effectiveness, strength and inclusiveness of these committees, their membership comprises board and non-board members of IAP2 USA, drawing on the talents and resources of the entire organization.

Financial Plan

Traditionally, IAP2 relied on three sources of income: membership dues, conference revenues and training license fees. Due to overall economic factors, the cost of travel, prohibitions on government staff travel, and the shift toward online interactions, conference revenues declined steadily over the last several years. During the same time, training revenue assumed an increasing share of the financial base for operating IAP2 International, while membership dues remained relatively static.

In looking forward to the financial sustainability of IAP2 USA, conference revenue does not appear to be a reasonable and sustainable major resource for the foreseeable future. In addition, large conferences require significant up-front investments of time and money that strain the financial and volunteer resources of the organization and create enormous financial risk from factors beyond our control. In addition, training revenue for IAP2 courses currently goes to IAP2 International, so IAP2 USA will have to establish its own sources of training revenues, which will take time. Assuming membership dues alone will be insufficient to meet our members' needs over the long term, IAP2 USA needs to develop and diversify its revenue sources.

On the other hand, to improve member services and reduce our carbon footprint in recent years IAP2 has moved from physical to electronic delivery of member services (e.g., newsletters, journals, membership directories, etc.), thus reducing the per capita cost of serving members. As such, the ratio of member dues to the cost of member services improves. Thus while revenue diversification will be important in the long run, membership income will necessarily be the primary source of revenue for IAP2 USA in the near term.

Consequently, the board will focus significant effort and priority on maintaining and growing the membership base, particularly in the initial phase of IAP2 USA's existence. Significant opportunities exist for renewing lapsed memberships, gaining organizational memberships, building sponsor relationships and attracting new members based on the reinvigorated profile for IAP2 USA and the member enthusiasm evident in the U.S. based on the creation of the new affiliate organizational structure.

Key to maintaining and attracting new members will be the prospective member's perception of our "value proposition." That is why the primary focus initially will be on both membership development AND programs and services, as developed by those two committees. As IAP2 USA grows its offerings, attracting members will become easier, and as membership increases we will have more financial resources to create additional programs and services. Regardless, we will always be significantly resourced by the volunteer efforts of our members and their elected board of directors. As such, the voluntary contributions of members are and will always be an essential foundation for IAP2 USA's continued success.

As another major source of member services and organizational support, IAP2 USA is in a strong position to co-sponsor, market, and over time develop our own fee-based public participation products, including training courses and programs. The Programs and Services Committee is responsible for building these relationships and opportunities as a benefit to members and others and to generate income for the organization. IAP2 USA will also explore a practitioner certification process that would increase the

professionalism of the field, create a source of organizational revenue, and provide an incentive for long-term membership in the organization by certified individuals.

Timing

Looking out on the three-year time frame for IAP2 USA's strategic plan, the phases we anticipate implementing are described below.

2011

The strategic focus in the first year is developing the necessary administrative, legal, and organizational structure to function as an affiliate and meet the basic needs of our members. This includes collecting membership dues, communicating effectively with our members, and providing initial value to them -- primarily in the form of being a public participation clearinghouse and information-dissemination source for our members. During this phase, we will develop a plan for additional member services and explore spearheading a national dialogue on public participation. We will engage our members to help define desirable services and shape future action, and we will also define IAP2 USA's relationship with its chapters and how we can best support them.

2012

During this phase we will introduce new products and services that may include training, case studies, job listings, and other professional development opportunities, and begin realizing new training revenue. IAP2 USA will decide whether to proceed with developing a practitioner certification process. Based on the relative success and symbiosis of support to existing chapters, during this year the board and chapter leadership will work together to consider encouraging and supporting new chapters. If appropriate partnerships with other organizations are in place, we plan to help convene a national dialogue on public participation in early 2012. This would also be the year we begin to address practitioner and member diversity.

2013

In the third year, IAP2 USA's profile, status, and value to the field of public participation will be secure. Our programs and services will have achieved maturity while continuing to grow and evolve to meet changing member needs. Membership will have increased substantially, the resulting revenue enabling us to promote excellence in the field by supporting dialogue and outreach events focusing on elected officials and other important non-member stakeholders. IAP2 USA will be a preferred provider/partner for practitioner training, and depending on decisions in previous years, would provide certification for practitioners in the field.

The Strategic Planning Committee will continue to evaluate and report on progress toward fulfilling the strategic plan through each phase of the process. This committee will also provide guidance to the board on updates and adjustments to the plan, and support the board's formal annual review.