

STATEMENT OF PURPOSE AND BRAND VALUES

&

2011-2014 STRATEGIC PLAN

For

**THE ILLUMINATING ENGINEERING SOCIETY
OF NORTH AMERICA**

Strategic Plan 2011-2014

Preface

The 2011-2014 strategic plan employs a pyramid structure. The pinnacle has a listing of Strategic Needs followed by Key Driver, the Goal, and a 3 year Vision. The list of directions for the Society will continue to be modified and further developed by the IES Board of Directors. The latter, the base of the pyramid, - - Strategic Initiatives and Metrics - - stipulates the duties of the IES staff.

The new format of the strategic plan is easy to read. It informs members of where the Society is moving. Note that the overall title of the plan states that the upper segment of the pyramid reflects the three year plan. The base of the pyramid details on one year projects; the two last categories will be changed each year.

The 2011-2014 Strategic Plan focuses on five areas each with a specific goal:

Education

Provide effective lighting education in various forms and levels to IES members, non-members, allied professionals, educators and students.

Technical Documents

Initiate and develop highest quality and timely standards, white papers and position statements.

Research

Promote lighting research that is needed to advance the art and science of applied lighting.

External Collaboration

Position the IES as the voice and advocate for lighting.

Membership

Support our current constituency, increase member commitment, and broaden our reach to expand the community we serve.

The headings are not new in themselves. The IES has a long history of strategic plans. Each plan focuses on different thrusts. One strategic plan follows an earlier plan. The results are forward movements and successful actions. Each has advanced the Society.

What has changed more recently is the way we operate, the advances in lighting technology, the emphasis on energy savings and on sustainability, the greater need for research, the media, the way in which people pursue education, and more. We once thought of ourselves as professional, respected, technical, knowledgeable and intelligent; we now think of ourselves as being progressive, dynamic, innovative, responsible, visionary, and excellent.

And, this is what we see in revised strategic plans. Many of the goals cited in the 2006-2010 plan and in the 2010-2012 plan have been achieved – the rebranding initiative, the revised

bylaws and the Society's mission and vision statements, the efforts to expand our community and to work with allied organizations.

In 2006, some goals such as positioning the Society as the preeminent voice and advocate for Quality Lighting in our communities were new; it is only in the last two years that this goal has attracted interest and work on this has begun. Tied to that is another goal – to work with other organizations; and we are succeeding there too.

There are, however, goals which have not seen fruition. In 2006, and in 2010, for instance, a mandate was to establish a Research Task Force to draft a document for developing a research initiative: action will be taken this year.

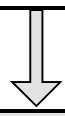
We frequently fine tune the Society's strategic plan. Hence the need to review the document; we eliminate that which has been successfully accomplished; we modify goals as events change; we formulate new goals that reflect changes in the Society and in the lighting industry. Very simply, the objective of the yearly review is to move forward for the benefit of members and the Society at large.

The success of so many plans is a credit to the Board of Directors, dedicated committees, Section leadership, and the time, commitment, and talent of all members.

We encourage all members to comment on the plan; it is, after all, your Society and your plan.

Strategic Needs

- The IES must provide educational offerings that are fresh, timely, and of an authoritative nature .
- IES educational programs must be able to reach all experience levels.
Increase development and availability for remote locations.
Increase development and availability education delivered in electronic formats.



Education

Key Drivers

On-Line Training	Seminars	Courses	Conferences	Webinars	Bookstore
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Goal Description

Provide effective lighting education in various forms and levels to IES members, non-members, allied professionals, educators and students

3 Year Vision

Outside organizations are made more aware of IES as the leader for lighting education.
Accessibility to lighting education is increased.
Develop comprehensive educational offerings that will include: seminars, courses, conferences, and outreach activities. These offerings will encompass all levels of educational needs from basic to advanced with additional opportunities for lifelong learn

Strategic Initiatives

Research and develop on-demand fundamental, intermediate, and advanced IES produced education.
Continue written seminars on application topics using RPs as the basis. RPs will have consistent "boilerplate" language.
Develop education partnering opportunities such as New Buildings Institute, Energy Center of Wisconsin, DOE, etc.
Develop new recorded webinar series.
Advertise new educational programs more effectively with electronic media.

Metrics

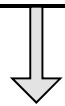
Goal is to produce 4-6 new intermediate/advanced seminars
Initiate short recorded webinar series on topics such as daylighting, color, sustainable issues, LEDs, Revit/BIM, smart grid, net zero energy, etc.
Engage with online provider for education and webinars.

Owner

Board (Needs, Goal, 3-Year Vision) Staff (Initiatives, Metrics).

Strategic Needs

Satisfy the interests and needs of those working within the lighting industry and associated fields.
Maintain IES leadership position in the development of lighting information in a timely fashion to respond to changing technology.
Expand relationships with allied organizations.
Foster research for input to document development.



Technical Documents

Key Drivers

Lighting Quality	Light and Health	Sustain-ability	Technology	Energy Mgt.	Application
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Goal Description

Initiate and develop highest quality and timely standards, white papers and position statements.

3 Year Vision

IES is the source for lighting knowledge, expertise and published standards.

Quick to market with consensus documents for use by industry and society at large.

Strategic Initiatives

Identify technical knowledge/document gaps and identify resources needed to accomplish.
Complete RP-1 through RP-8, DG 22 and DG 25, with standardized technical content, formatting and synchronization with 10th edition IES Lighting Handbook, and inclusion of sustainable information.
Establish target marketing plan for documents directed to specific interest groups.
Continue the promotion of web meetings to encourage faster response and shorted cycle for revision, reaffirmation of aging documents.
Identify opportunities for collaborative standards development with other organizations.

Metrics

Number of standards purchased from the IES
Number of collaborative opportunities identified
Number of publications produced by the IES

Owner

Board (Needs, Goal and 3-Year Vision) Staff (Initiatives, Metrics)

Strategic Needs

Collect / disseminate body of existing research
Ability to analyze and address technology and industry issues and identify new research needs.
Ability to help secure and provide funding to perform necessary research.

Focus Area

Key Drivers

Goal Description

3 Year Vision

Strategic Initiatives

Metrics

Owner

Research

Indoor Lighting	Outdoor Lighting	Sustainability	Human Health	Energy	New Technology
Promote lighting research that is needed to advance the art and science of applied lighting.					

Establish and communicate lighting research priorities that influence the research resource allocations of other funding sources.
IES sponsored publications, conferences, and symposia become the preferred vehicle for dissemination of lighting related research, both within and outside Society membership.
Implemented research funding program and process for soliciting and selecting research to be funded by the society specific to our committee needs, society needs or industry needs.
Communication of new research findings are thoroughly discussed, vetted , and incorporated into IES events, education, documents, and publications, both contributing to a lively intellectual environment within the IES membership and perception of IES as the most comprehensive resource for up-to-date information on lighting science and application.

Establish a Planning subcommittee to develop a blueprint document for developing a research initiative to address funding options, procedures for soliciting and selecting research from IES committees and open solicitations from academia, lighting research organizations or private industry.
Establish an Execution sub committee to develop formal procedures for review and response to research proposals to insure researchers' qualifications, validity of a project, and work plan scope, and that the results will be unbiased and without reproach.
Establish a sub committee within the IES Research committee to advance the IES online research database.
Evaluate needs of IES committees for specific research topics.
Evaluate and utilize results of symposia for future research needs.

Number of research projects identified and partnership funding opportunities.
Development of the online research database into a useful tool.
Publish symposium report as tool for outreach with decision makers and government agencies

Board (Needs, Goal, 3-Year Vision) Research Comm. (Vision,Metrics) Symposium Steering Comm (Vision, Initiatives, Metrics) Staff (Initiatives,Metrics)

Strategic Needs

IES must be the recognized authority on issues related to the lighted environment and a provider of information.
IES must develop allied partnerships and increase participation with other organizations.



**External
Collaboration**

Key Drivers

MOUs Joint standards Allied Partners Public Policy

Goal Description

Position the IES as the voice and advocate for lighting.

3 Year Vision

- Influence actions and policies of other organizations related to the lighted environment.
- Respond quickly and appropriately to likely actions from allied organizations.
- Collaborate with other organizations in the development of joint standards
- Have a proactive role in influencing actions and policies of others.
- Have clear lines of communication with policy makers.

Strategic Initiatives

- Staff has the responsibility for coordinating initial IES involvement with allied organizations and establishing organization to organization contact among staff and senior leadership.
- Staff has the responsibility of drafting MOUs with other organizations.
- Staff has the responsibility of identifying qualified IES members to serve on other organizations' committees.
- IES representatives should attend and participate in other organizations conferences and events to identify opportunities for collaboration on issues of mutual interest.
- Create lighting quality initiatives around: Energy vs. Power, Environmental Impact, Code Guidance and Light Pollution.

Metrics

- The number of legislative issues in which the IES provides guidance.
- Number of MOUs with other organizations.
- Number of joint standards with other organizations.

Owner

Board (Needs, Goal, 3-Year Vision) Staff (Initiatives, Metrics)

Strategic Needs

The IES must serve the needs of its members.

The IES must connect with students and young professionals so they can be a credible and accessible resource to the next generation of lighting professionals.

Clear, organized and meaningful communication tools need to be created and continually improved.



Membership

Key Drivers

Value and Benefits	Communication	Growth	Allied Partner Opportunities	Mentorship	Section Health
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Goal Description

Support our current constituency, increase member commitment, and broaden our reach to expand the community we serve.

3 Year Vision

- A strong organization with an engaged and active membership.
- An organization focused on creating more value and benefits to members leading to professional growth.
- Multiple communication tools and faster communication for information and collaboration.

Strategic Initiatives

- Add a quarterly member benefits bulletin to IES Newsletters. (Develop with Marketing and Internet departments.)
- Create a reporting process for the Board of Directors to evaluate Sections and develop a "Section Scorecard" to include: membership totals, programs, leadership, and member participation in allied organizations and/or programs.
- Conduct Email or phone surveys to all members of two+ years who did not renew their membership
- Foster Emerging Professionals and Mentorship Programs within each Section.
- Create membership opportunities for allied organizations and community experts.

Metrics

- Total Membership Growth year over year
- Average Age of the IES Membership - Goal to attract young professionals to the IES
- New Member Growth year over year
- Membership Satisfaction Scorecard improvement
- Number of renewed Membership year over year improvement
- Increased attendance and attendee ratings of the IES Annual Conference
- Number of Ideas generated from Survey / Questionnaire to new Members

Owner

Board (Needs, Goal, 3-Year Vision) Staff (Initiatives, Metrics)

Addendum A

Brand Values

A. Perceived Attributes of the Previous IES Brand

*Professional...Respected...Technical...Knowledgeable...Intelligent...
Conservative...Quiet...Conventional...Slow...Traditional*

IES has been perceived as an umbrella organization that publishes recommended practices for those involved in lighting. IES has been seen as a Society where lighting professionals can socialize and network. Past criticisms of the IES as an organization that moved too slowly and cautiously have largely been erased in recent years in which our members have seen a more proactive, engaged Society.

The 2006-2007 Board identified that the IES has had a lack of visibility with the public which has the potential for limiting the future growth and vitality of the organization. This issue will be addressed with the new Strategic Plan.

Maintaining the organization's sense of history and recognizing it as the lighting standards and research organization is very important. Secondly, creating knowledge-based activities focused towards education and the improvement of the lighted environment is also critically important.

There is much pride in our organization, especially from members who value the ability to network with their peers and make new connections in their local lighting community.

Future Attributes of the Brand

*Professional...Respected...Technical...Knowledgeable...Intelligent...
Progressive...Dynamic...Innovative...Responsive...Visionary...Excellence*

That same Board in 2006-2007 determined that the IES in the future should be known by the stakeholders and the public as an organization that actively promotes lighting issues that affect people's daily lives. It should be an active, vibrant organization that can effectively bring about change by disseminating knowledge quickly about emerging lighting technologies and that practitioners should not be able to get along without it.

In terms of visibility the IES needs to increase its exposure within the architectural and design community, it needs to increase dialogue with section leadership and increase awareness amongst students and faculty in lighting, and finally play a role in the promotion of lighting research.

In order to grow, the IES needs to include a broader base of stakeholders, young professionals and associated professionals. In addition to adding new members, the IES must do a better job of alignment with its current membership base by providing new services and offerings. We need to raise the awareness of lighting in the public realm and market the IES as the industry spokesperson and leader in lighting.

Audiences

During the 2007 brand strategy work, the Board looked at who their current audiences were and if there were any gaps in those audiences or if they should redefine them. It was noted that we should place emphasis on the expertise and diversity of our membership, and how collectively working together with one voice, we can achieve much more than as individuals. The following list defines our audiences.

Lighting Designers

Professional Lighting Consultants

Allied Professionals

Professional in allied fields (i.e. - architects, engineers, designers, planners, landscape architects), who are involved directly or indirectly in the specification of lighting equipment for the built environment

Researchers & Educators

Professionals involved in lighting or lighting related education and/or research

Lighting Fixture, Equipment and Lamp Designers

Professionals involved in the design of lighting equipment

Lighting Related Equipment Manufacturing Sales & Distribution

Professional involved in the marketing, sales and distribution of lighting equipment.

Contractors, Builders, Utilities & Service Companies

Those companies/individuals involved in the installation and/or maintenance of lighting equipment. (*This includes Energy Service companies and Lighting Management companies*).

Lighting and Energy Regulators

Federal, State, County and Local Government Agencies, Entities, and Elected Officials.

End Users of Lighting Equipment

Those groups that use lighting equipment for use in businesses, homes, and communities. (*i.e., Building Owners, Facility Managers, General Public, Utilities, Municipalities*)

Students

Those being either introduced to the profession or studying to enter the field of lighting (*i.e., K-12, Colleges & Universities, Technical Schools*)

Organizational Values

In carrying out all of its activities, the IES is committed to the following:

- Identifying and serving the evolving needs of our membership
- Fulfilling our mission in a socially, economically, and environmentally responsible fashion
- Developing effective strategic relationships and collaborative initiatives with appropriate external partners
- Building a model for engaged planning into our governance and management processes to incorporate regular evaluation of the impact and successes of initiatives and activities
- Sustaining the IES

Mission & Vision Statements

The mission and vision statements are the guiding principles for the Strategic Plan. They provide a clear, unified direction for all of our activities.

Mission Statement:

The IES seeks to improve the lighted environment by bringing together those with lighting knowledge and by translating that knowledge into actions that benefit the public.

Vision Statement

The IES will build upon a century of excellence to create the premier lighting community dedicated to promoting the art and science of quality lighting to its members, allied professional organizations and the public.