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2023-2027 STRATEGIC PLAN

DRAFT 06.06.22



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FOREWORD

This June 6, 2022, Draft 2023-2027 LAI Strategic Plan is the product of numerous volunteers working collaboratively in committee format over a multi-month timeframe. It builds upon previous drafts and incorporates revisions generated at the Spring 2022 Board of Governors Strategic Plan Working Session and additional comments received by May 20, 2022.

This draft is NOT the finished product. As detailed in the following schedule there is substantial opportunity for feedback and refinement.

PROCESS AND SCHEDULE

- 06.06.22 Revised Draft Strategic Plan Release to all LAI Members
- 06.21.22 First Zoom Meeting Open to All LAI Members (11 am Pacific Time)
- 07.08.22 Second Zoom Meeting Open to All LAI Members (11 am Pacific Time)
- 07.31.22 End Period for Submittal of Final Comments
- 08.15.22 Final Draft Strategic Plan Submitted to LAI Board of Governors
- 10.13.22 Strategic Plan Approval by Board of Governors

HOW THIS STRATEGIC PLAN WAS PREPARED

This 2023-2027 LAI Strategic Plan is the culmination of work by subject matter committees convened over an eight-month period to assess existing conditions, identify priorities, and develop recommendations for improvement of LAI operations and outcomes over the five-year period for which this plan is in effect.

STRATEGIC PLAN COMMITTEES

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COMMITTEE SUBJECT MATTER REPORTS

Committee subject matter reports were prepared to document committee research and deliberation and are provided in compilation format as an appendix to this plan. Electronic links to these reports, which are anticipated to be updated periodically, will be integrated into the final Strategic Plan document for ease of access.

**REPORT 1: BACKGROUND AND PERSPECTIVE OF LAI AS A CORPORATION
AND FEDERATION OF CHAPTERS**

REPORT 2: GUIDE FOR EXISTING CHAPTERS

REPORT 3: DEVELOPMENT OF NEW CHAPTERS

REPORT 4: MARKETING LAMBDA ALPHA INTERNATIONAL

REPORT 5: GLOBAL CHAPTER AND THE AD-HOC PROGRAM COMMITTEE

REPORT 6: COMPREHENSIVE REVIEW OF LAI SERVICE OFFERINGS

REPORT 7: MEMBERSHIP

REPORT 8: LAND ECONOMICS FOUNDATION

SUPPLEMENT: LEW SURVEY REPORT 09.24.21

STRATEGIC PLAN DEFINITIONS

"LAI"	All members, all Chapters, the Board of Governors, and the Executive Director of Lambda Alpha International.
"Board of Governors"	All Chapter Presidents and all Executive Committee members as defined by the Lambda Alpha International Bylaws.
"International"	All authorized Committees, the Board of Governors and the Executive Director of Lambda Alpha International.
"Chapter(s)"	All chartered Chapters and their members.
"Members"	All Chapter members and At-Large members.
"LEF"	The Land Economics Foundation and its Directors that serve as Trustee of a special fund created by Lambda Alpha International to support the study, awareness and advancement of land economics.
"LEW"	Land Economics Weekend
"PAD"	Professional Advisory Delegation
"RVP"	Regional Vice President
"ARVP"	Assistant Regional Vice President



2023-2027 LAI STRATEGIC PLAN

(DRAFT 06.06.22)

PART A

INTRODUCTION, PRIORITIES AND ACTIONS

INTRODUCTION

Lambda Alpha International, LAI, is an honorary membership society that exists to aid in the development and sharing of land economics principles and practices. It provides a forum for its members for the transfer of knowledge and debate on land economics issues. Its multidisciplinary membership includes professionals in government, private industry, education and nonprofit sectors who are distinguished in their fields, recognized for their accomplishments and nominated for membership by their peers.

LAI meetings, programs, events and publications provide a platform to facilitate land economics discussions, encourage learning, support professional networking and honor significant contributions and achievements. Interaction between members facilitates cross-pollination of ideas and land use practices that encourage the long-term viability, sustainability, and productivity of land resources.

This 2023-2027 (*Draft*) *LAI Strategic Plan* builds upon successes from the preceding 2018-2022 *LAI Strategic Plan*, as well as recognizes and addresses organizational challenges that emerged during that period and were augmented by the COVID-19 pandemic. Most notably, LAI fell short of membership growth goals and experienced an overall decline in local Chapter membership. In terms of governance and programming, both International and local Chapters responded by investing in human and capital resources to manage a shift from in-person to virtual meeting formats.

Cumulatively, these challenges resulted in loss of Chapter revenue, strain on Chapters with limited or no professional staff, and impact on overall perceived value of membership as measured by program participation, new member initiates, new Chapter formation and payment of dues.

On the upside, the strength and resiliency evidenced by LAI members during these unprecedented times was nothing short of inspirational. The responses and this Strategic Plan are testament to the strength of this honorary society and the principles upon which it was founded and is maintained.

Therefore, this 2023-2027 (*Draft*) *LAI Strategic Plan* sets forth strategies to grow value for members, strengthen existing and new Chapter operations, improve governance, and expand membership worldwide.

CHALLENGES

DECLINING MEMBERSHIP

The 2018-2022 LAI Strategic Plan was based on a goal of achieving sustained growth in membership of 5% per year. It stated that this increase should be achieved through a combination of increasing membership of existing Chapters, increasing Members-at-Large, broadening the scope and outreach of the Global Chapter, and establishing new Chapters. With increased membership, LAI would then be able to further augment Chapter support.

In fact, membership did not increase:

- Over a nine-year period from 2013 to 2021 membership declined ~12%.
- Membership was flat from 2017 to 2020 and then decreased ~5% during the pandemic.
- Nearly 85% of LAI membership is concentrated in 12 Chapters with >50 members.
- The 17 Chapters with <50 members report struggles to maintain membership.
- No Chapter formed since 2013 has reached a baseline of at least 25 members.

IMPACT AND VISIBILITY

Historically, LAI has been purposefully internal in focus as an honorary society with programs, meetings and publications limited, primarily, to members and their guests. With competing demands on people's time invested in efforts outside of work and home, perceptions of LAI likely influence member retention and attraction rates. The balance of internal versus external impact and visibility of LAI and LEF is a challenge to address in order to maintain and maximize relevancy of the society, grow member participation and support member recruitment.

RESOURCE UTILIZATION

LAI has finite resources in terms of operational capital garnered through dues, program revenue and contributions. In response to a number of factors, including the essential need to address Chapter support and membership growth, evolve communications via virtual and social platforms, and other operational imperatives during this Strategic Plan period, there is a need to reallocate funds. In terms of human capital, there is need to broaden participation in society stewardship by members across the organization in order to relieve burden from a relatively small set of members that do the majority of work.

OPPORTUNITIES

Moving towards the 100-year anniversary of LAI there are many reasons to be optimistic about the future. The multidisciplinary composition of membership and the breadth of communities in which LAI is integral in cities around the world are strengths upon which to build. Surely, the role of land economics policies and practices required to address 21st Century challenges is profound.

In order to meet such challenges, there are matters that LAI must address in the near term in order to strengthen operations, drive growth and increase impact related to land economics.

Opportunities to pursue include, but are not limited to, the following:

GROW MEMBERSHIP

Elevate the value proposition of LAI membership to retain and attract members in order to grow the honorary society. Combine this with intentional focus on diversification of members in terms of professional abilities, demographics, and achievements in order that membership represents the diversity of communities in which LAI is rooted and serves.

NURTURE HEALTHY CHAPTERS

Increase support for sustaining and growing smaller Chapters and/or Chapters in decline. Help maintain and continue to grow the larger chapters.

COMMUNICATE

Invest in internal and external communications to strategically connect the activities and intellectual capabilities of Chapters and members and to raise awareness of the impact and relevance of LAI and LEF in the 21st Century.

STREAMLINE OPERATIONS

Refocus International financial resources to implement this Strategic Plan with emphasis on growing membership and supporting local Chapters to achieve sustainable levels of membership, fund communications initiatives and maintain focus on member retention, dues payments, sponsorship and contributions.

STRATEGIC PLAN PRIORITIES

- 1. ESTABLISH AND ACHIEVE MEMBERSHIP GROWTH GOALS.**
- 2. ASSIST CHAPTERS IN ATTAINING SUSTAINABLE MEMBERSHIP LEVELS OF 25 MEMBERS OR MORE AND OPERATIONAL EFFICIENCY.**
- 3. UPDATE THE NEW CHAPTER DEVELOPMENT GUIDE CRITERIA AND IMPROVE THE PROCESS FOR ESTABLISHING NEW CHAPTERS.**
- 4. REORGANIZE THE GLOBAL CHAPTER TO BE A GLOBAL INITIATIVES COMMITTEE TO CLARIFY ITS MISSION, EXPAND OFFERINGS AND SUPPORT EVENTS HIGHLIGHTING LEF RESEARCH.**
- 5. DEVELOP A COMPREHENSIVE COMMUNICATIONS PLAN TO ELEVATE THE BENEFITS OF LAI MEMBERSHIP AND THE SHARING OF KNOWLEDGE.**

STRATEGIC PLAN ACTIONS

Following are the highest priority actions for this Strategic Plan.

1. PRIORITIZE INTERNATIONAL RESOURCE EXPENDITURES TO GROW MEMBERSHIP.

- Reduce in-person Board of Governors meetings to one per year.
- Direct LAI resources on efforts to increase membership.
- Develop and implement action plans for Chapters with less than 25 members to support attainment of sustainable growth and efficient operations.

2. CREATE A MEMBERSHIP COMMITTEE.

- Collect and evaluate membership data and feedback to support existing member retention and new member recruitment initiatives.
- Improve existing and create new communication and onboarding tools that describe the value of LAI membership and participation.
- Work with local Chapter membership committee chairs to identify successful tactics to attract members for use by other Chapters.
- Appoint members with demonstrated success in member attraction and retention.

3. ASSIST LOCAL CHAPTERS IN FULFILLING THEIR RESPONSIBILITIES.

- Provide personal and targeted mentors to fledgling local Chapters and help them become more viable and sustainable. Mentors will be available to all new Chapters for their first three years and to all Chapters falling below a threshold of 25 members.
- Review the role of RVPs/ARVPs in chapter health to determine what resources are necessary for training and what financial support is needed so they can effectively assist local Chapters.
- Provide a specific training program for new RVPs/ARVPs early in their terms using the newly developed Board Book.

4. ASSIST CHAPTER ONBOARDING AND COLLABORATIONS.

- Develop a new/recent Chapter onboarding program that will help build intra-Chapter relationships and build cross-Chapter connectivity.
- Create a new member onboarding program so that new members are better connected with their local Chapter and with International LAI.
- Identify and utilize virtual communication to improve LAI programming and new member attraction.

5. STRENGTHEN THE PROCESS FOR THE DEVELOPMENT OF NEW CHAPTERS.

- Develop a process for approving which geographic areas will be targeted and timing for approval.
- Provide new Chapter formation training for RVPs/ARVPs so roles are understood in creating and supporting new Chapters.

6. DEVELOP A COMPREHENSIVE COMMUNICATIONS PLAN.

- Utilize communications as a means to elevate the value of membership for current members, while also elevating the visibility of the organization to attract new members.
- Identify communication goals, strategies and tactics and fund deployment.
- Develop key performance indicators to assess impact.

7. RESTRUCTURE LAND ECONOMICS WEEKENDS (LEWS).

- Shift from two LEWs per year to one LEW per year.
- Curate LEW programming to maximize broad appeal and increase participation at LEWs.
- Supplement LEWs with invitation and support for periodic Professional Advisory Delegations (PADs) and regional and sub-regional meeting formats.
- Establish a LEW and PAD Committee (Assemblies Committee) to conceive and advance programming of these events.

8. TRANSITION THE GLOBAL CHAPTER TO A GLOBAL INITIATIVES COMMITTEE.

- Rename and reconstitute the Global Chapter as the "Global Initiatives Committee" to clarify its purpose, role, and function.
- Establish a Global Initiatives Committee with responsibilities to conceive and advance a regular program of events.
- Expand the number of Global Initiative programs by offering recorded Chapter Programs of broad interest, featuring Land Economics Foundation grant research, and connecting with members who want to develop programs.

9. RAISE AWARENESS AND INCREASE FUNDING FOR THE LAND ECONOMICS FOUNDATION.

- Increase the financial participation in LEF by LAI members.
- Create, promote and deliver an annual LEF program (recorded webinar) in collaboration with LAI to present LEF-funded research to members and to highlight available opportunities.
- Develop and implement an approach to requesting/encouraging and recognizing larger individual contributions, bequests, and in-memorial donations to the LEF.

PART B

STRATEGIC PLAN SECTIONS

ORGANIZATION AND CONTENT

This Strategic Plan is organized into eight sections listed as follows. Section 1 is a declaration of the Vision, Mission, Principles and Goals that guide LAI as an honorary membership society and establish the foundation upon which all Strategic Plan Actions are based. Sections 2 through 8 each include in-depth background information and issues identification, together with a recommended action item agenda.

SECTION 1: LAI AS A CORPORATION AND FEDERATION OF CHAPTERS

SECTION 2: MEMBERSHIP

SECTION 3: EXISTING CHAPTERS

SECTION 4: DEVELOPMENT OF NEW CHAPTERS

SECTION 5: COMMUNICATION INITIATIVES

SECTION 6: GLOBAL INTIATIVES COMMITTEE

**SECTION 7: BUSINESS MEETINGS, LAND ECONOMICS WEEKENDS,
PROFESSIONAL ADVISORY DELEGATIONS AND
REGIONAL / INTERREGIONAL MEETINGS**

SECTION 8: LAND ECONOMICS FOUNDATION

SECTION 1

LAI AS A CORPORATION AND FEDERATION OF CHAPTERS

1.1. BACKGROUND

Lambda Alpha International, LAI, is an honorary membership society that exists to aid in the development and sharing of land economics principles and practices. Its corporate purpose is to provide a forum for its members for the transfer of knowledge and debate on land economics issues. Its multidisciplinary membership includes professionals in government, private industry, education and nonprofit sectors who are distinguished in their fields, recognized for their accomplishments and nominated for membership by their peers.

LAI meetings, programs, events, and publications provide a platform to facilitate land economics discussions, encourage learning, support professional networking, and honor significant contributions and achievements. Interaction between members facilitates cross-pollination of ideas and land use practices that encourage the long-term viability, sustainability, and productivity of land resources.

LAI does not advocate for one land use and related policy over another. Rather, it is a platform for discussing land use and expanding the knowledge of land use and related policies in an environment for sharing ideas that enhance the communities in which members practice and live.

1.2 VISION | HONORARY, MULTIDISCIPLINARY, DIVERSE AND GLOBAL

LAI is an honorary society established to recognize and facilitate interaction among the leaders in all professions contributing to land economics.

LAI's multidisciplinary membership is intentionally diverse, equitable and inclusive in order that multiple points of view and experiences are considered to inform land economics policies and practices.

LAI is the preeminent global forum for land economics where members develop valuable connections, expose challenges and responses, share best practices, and participate in learning experiences – all to make positive impact in communities worldwide.

1.3 MISSION | CONNECTING PROFESSIONALS AND SHARING KNOWLEDGE

LAI's mission is to provide a global platform for the convocation and networking of professionals who have distinguished themselves in the fields of land economics. Its purpose is to facilitate knowledge exchange for the promulgation of sound land economic policies and practices across sectors, industries and academia.

LAI accomplishes its mission by sustaining an international network of healthy Chapters that are each distinguished by ongoing growth and retention of active, diverse and inclusive members, the conduct of interesting and innovative programs, and impactful community service.

1.4 PRINCIPLES | WHO WE ARE

LAI is an honorary membership society that embraces and promotes principle values that serve as a compass for behaviors and actions, both in terms of the organization and professional practice worldwide.

Focus: LAI is a non-political, non-partisan and non-attribution forum for discussing land use policies and practices.

Comprehensive: LAI embraces the comprehensive spectrum of professional and academic activities and perspectives relating to land economics.

Global: LAI fosters and shares land economics-related expertise from members, at local, regional, national, and international scales.

Knowledge: LAI seeks knowledge in land economics from research, professional practice and intellectual idea exchange to constantly critique and expand current thinking and practices.

Exchange: LAI fosters education, knowledge exchange and social interaction for discourse, advancement and comment on relevant issues of land economics among members and guests in free-speech meetings.

Diverse: LAI values diversity in members, expertise and experience.

Equity: LAI commits to equitable treatment and elimination of discrimination in all its forms at all organizational levels and throughout all programs.

Respect: LAI adheres to a culture of respect courtesy, civility, decency, diversity, honesty and inclusion regarding interaction between members, guests, staff and vendors.

1.5 GOALS | WHAT WE SEEK TO ACHIEVE

1. To expand member knowledge and understanding of the principles of land economics through vibrant educational programs, information exchanges and open dialogue.
2. To enhance and contribute to the built environment and quality of life in communities by supporting the sharing of initiatives and best practices from the fields of land economics.
3. To foster connections among members and Chapters through interactive programming and forums related to land economics.
4. To ensure every member has the right to equal protection and equal benefits without discrimination and, in particular, without discrimination based upon race, ethnicity, national origin, gender, age, sexual orientation and physical or mental abilities.
5. To encourage and advance the fields of land economics while upholding the highest ideals of scholarship and integrity.
6. To recognize leaders whose achievements have contributed to the advancement of the fields of land economics and/or the practical application of its principles to the stewardship of the world's land resources and the creation of resilient communities.

SECTION 2

MEMBERSHIP

2.1. BACKGROUND

Both the heart and foundation of LAI are its members. LAI's members are a rich resource of diverse and accomplished professionals with varied backgrounds all involved in a field related to land economics. These members come together in local Chapters, which, in turn, comprise the International organization.

Membership is the resource on which LAI meets its purposes. Membership in Lambda Alpha International is an honor. We are guided by the maxim that "the law of society is service" – an obligation to provide service to the community by working to find ways to contribute professionally to the enrichment of the planned environment.

Members are attracted to LAI through the strength of local Chapters, which offer a rich resource for professionals to network, share information and best practices, bring challenges for open and frank discussion, and aid their communities as an unbiased contributor to broader conversations. Local Chapters regularly conduct professional programs for both their members and their communities.

International, in coordination with local Chapters, sponsor annual Land Economics Weekends giving all members an opportunity to meet and learn about land economic issues in cities throughout the world. International publishes a newsletter, KeyNotes, and maintains an expanding website where members network and share information. Through the Land Economics Foundation, LEF, LAI supports annual scholarships and funds other educational pursuits.

The COVID-19 pandemic impacted Chapters and caused a temporary pause to International and Chapter gatherings. Since 2020 membership has declined by 5% in total, and generally followed the trends in membership seen since 2013, with a drop in total membership in about half of the large and small chapters. Some chapters have grown in that time or remained constant, which recognizes the strength of member commitment to LAI.

Since the start of the COVID-19 pandemic, Global Initiative webinars have provided programming and networking for a broader audience by featuring research supported by LEF and drawing upon LAI members to offer programming from their areas of expertise. Global programming was well received and well attended across the chapters, which demonstrates its value to the membership.

The Global Initiative (discussed more fully in Section 6) has been identified as an emerging strength for LAI. It's an opportunity for a rethink of the Global Chapter, which has had challenges in its member structure and mandate. The Global Initiative has been identified as an opportunity for interested local Chapter and At-Large Members to support the Global Initiatives Committee in the development of initiatives and programs that are aimed at all members and that increase cross-Chapter engagement.

LAI is strengthened by the diversity of its membership across professional sectors and across demographics. To that end, LAI has identified a need to better understand the makeup of today's members – who they are, their special areas of focus, and what drives them to become, and remain members; and to support increasing the diversity of the membership of local chapters, and in turn, of International.

LAI chapters have had varying degrees of success with a student member category – and some Chapters do not include this category of membership. The LAI Student Association (LAISA) was established to support

pathways to membership by mentoring students. However, LAISA has not been a priority for International direction or funding, and many local Chapters have found that the requirement for membership, having 10 years of professional experience, often results in students leaving the association and not returning as full members. The investment in mentoring and engaging students certainly has merits – sharing the wisdom of experience and gaining fresh perspectives and contemporary knowledge through exchange – however LAISA has not proven to be a membership recruitment vehicle for the organization.

Finally, the health of local Chapters relies on the strength of its members. As outlined in Section 3, Existing Chapters, support to local Chapters includes strengthening local Chapter administration and supporting local Chapter and member engagement in regional and International initiatives. Additionally, supporting new members by introducing them within their Chapters and into the International community will enrich their experience, thereby supporting recruitment and retention.

This LAI 2023-2027 Strategic Plan addresses objectives to maintain and grow the diversity of membership in larger Chapters, sustain and grow smaller Chapters, strengthen member engagement and support At-Large Members.

2.2 ACTION ITEMS

1. **Collect General Data about the LAI Membership** – Gather membership data (demographics, professional acumen, and interests). The member Profile tool on the website was augmented in 2021 to capture broader member profile information and updates. The profile update effort was launched with the dues renewal process for 2022.

Membership profiles will be reviewed after the dues renewal season to assess trends, assess gaps, and determine next steps toward maintaining a more accurate data set regarding the composition of LAI membership. Additional survey work has been identified to seek input into key motivations for membership, and ways to support members to enrich their experience in LAI.

2. **Create Membership Committee** – A Membership Committee was proposed in the 2018-22 Strategic Plan but never implemented due to confusion of the role of the Membership Committee and the Chapter Service Committee. The Membership Committee's role is to evaluate membership data, improve existing and create new membership tools that describe the value of LAI membership, work with local Chapter membership committee chairs to identify successful ideas to attract members for use by other Chapters, and to provide structure for At-Large membership. The Chapter Services Committee has a full workload that is distinct from these tasks.

The Membership Committee should consist of members who are not overburdened by other International duties, especially the Regional Vice Presidents and their assistants, and who have demonstrated success in member attraction and retention.

3. **LAISA Student Association** – Review LAISA/student member category and how Chapters support young entrants to the industry to determine the merits of continuing the LAISA program.
4. **Create the LAI Onboarding Program** – Deploy LAI Onboarding Program to help new/recent members build intra-Chapter relationships, raise awareness of new member diversity, build cross-Chapter connectivity, and increase the value proposition that LAI offers its members. International shall share the concept with Chapter leadership for input and refinement and then develop a framework for the Onboarding Program to share with interested Chapters, including Spanish-speaking local Chapters. The Onboarding development team should include members of the LAI Chapter Services and Communications Committees.

SECTION 3

EXISTING CHAPTERS

3.1. BACKGROUND

LAI, or International, is the incorporated representative body of a federation of local Chapters that are chartered by LAI. Local Chapters are responsible for articulating and advancing the priorities of their Chapter consistent LAI's corporate purpose and guided by LAI's Vision, Mission, Principles and Goals.

Local Chapters form as independent corporate entities and adopt variations of the LAI Model Standard Bylaws, as required by International Bylaws. They maintain a strong interdependent bond of governance with International and with other local Chapters through Chapter representation on the LAI Board of Governors, the LAI Chapter Services Committee and through the efforts of the LAI Regional Vice Presidents, RVPs, and Assistant Regional Vice Presidents, ARVPs. Local Chapter leadership is expected to communicate to its members the value of International participation, association and fellowship, including the obligation to pay local Chapter and International dues.

The health of local Chapters – including membership growth and retention, active, diverse, and inclusive membership, interesting and innovative programs, community service and outreach, participation in and access to “global initiatives,” Land Economics Weekend hosting events, membership-wide initiatives, and communications – is essential for the success of LAI as an international organization. International must prioritize its support for local Chapters by providing services, mentorship, oversight, and value in an equitable manner that supports success across the entire organization.

HEALTHY CHAPTERS WILL:

- Adopt local Chapter By-Laws providing for governance that is current and consistent with the model Standard Chapter Bylaws of LAI and which are filed with LAI.
- Ensure all Members have acknowledged the LAI Code of Conduct Pledge.
- Maintain no fewer than 25 members such that they can regularly host well-attended programs. A suitable goal is to have 25 or more members within three years of formation.
- Initiate new members annually to more than replace retiring members.
- Ensure that retiring local Chapter members are aware of the Retiree LAI Membership Category and can remain an informed, participating member of the organization.
- Have active regard for succession planning for local Chapter governance and to ensure refreshed leadership for the International Board of Governors.
- Seek out a diverse and inclusive composition of members and leadership.
- Representation of the breadth of land economics professions across private, public, nonprofit and academic sectors, including planning, design, engineering, development, land management, preservation, land use law, real estate, governance and other relevant fields.

- Track local Chapter member status to ensure the timely payment of dues, and when necessary, follow up with members to avoid late payment.

HEALTHY CHAPTERS WILL EXHIBIT SOME OR ALL OF THE FOLLOWING CHARACTERISTICS:

- Achieve sufficient financial resources/reserves to support Chapter programs and events.
- Maintain sufficient financial resources to fund administrative support to undertake most of its administrative functions, thereby ensuring that administrative functions do not unduly burden the Chapter executive committee.
- Keep the Chapter's status current with State incorporation and tax filings.
- Maintain robust internal and external communication, including an up-to-date website.
- Regularly share news about International activities and initiatives with members, including opportunities to attend Land Economics Weekends, regional conferences, sister Chapter events and global programs. Publicize LEF research initiatives, International KeyNotes publications and encourage participation in LAI Awards, etc.
- Utilize effective tools and methods to reach a wider and more inclusive audience via social media and similar communication channels.

A healthy Chapter really needs many more than 25 members. In reviewing the health of Chapters, the direction of membership growth (or decline) is as important as the absolute number of members. A Chapter with membership well above 25 but declining membership may not be considered healthy and could need assistance. In contrast, a Chapter fewer than 25 members but growing membership may be on a path to be a strong Chapter and not require additional assistance. Therefore, with limited resources to support Chapters, the Strategic Plan actions focus on monitoring and providing special support for Chapters with less than 25 members, as needed.

The Chapter Services Committee will continue to monitor membership for all Chapters and International will provide tools to support the value of membership for all Chapters. The proposed Membership Committee described in Section 2, Membership, will concentrate on providing tools to help all Chapters retain their existing members and attract new members.

The Chapter Services Committee is charged with identifying and elevating local Chapter issues, convening, and conducting Presidents' Roundtables, and providing Chapter support and grants on a regular and proactive basis. The RVPs/ARVPs oversee Chapters in their respective Regions and have a principal role as a conduit between International and local Chapter leadership and are responsible for monitoring status.

The RVPs/ARVPs identify the opportunity and need for mutual support or "mentorship" to ensure the success of local Chapters. Ultimately, one of the most important responsibilities of the RVPs/ARVPs is to identify when a local Chapter is in need of revitalization, and to develop a support methodology and action plan for carrying this out.

The RVPs/ARVPs have a substantial workload monitoring and supporting existing Chapters, as well as assisting with approval and development of new Chapters. Historically, financial resources have been limited and RVPs/ARVPs have not been thoroughly trained in how to accomplish their duties. Recently, International has prepared a "Book Board" that describes roles and duties for LAI Board members (Executive Committee members and Chapter Presidents), which provides direction for the RVP/ARVP responsibilities.

3.2 ACTION ITEMS

- 1. Assist Local Chapters in Fulfilling their Responsibilities** – During the Strategic Plan period this assistance will include:
 - a. Availability of Chapter support grants intended for administration, website development or other Chapter-identified needs.
 - b. Personal and targeted mentorship as necessary to establish viable and sustainable local Chapters. This mentorship will be provided by, among others, the RVP and the ARVP. It will be applied to all new Chapters for their first three years, and to all Chapters falling below the threshold of 25 members.
 - c. Participation in President's Roundtables held quarterly, including prior to the Board of Governors meeting or via teleconference.
- 2. Determine Necessary Financial Resources and Training for RVPs/ARVPS** – Provide financial resources in the annual LAI Budget to support the RVPs/ARVPs in the effective conduct and completion of their assignments. A specific training program using the newly developed Board Book should be provided early in the term for new RVPs/ARVPs.
- 3. Conduct Annual Workshops to Present the “Keys To Success”** – International will provide the International meeting schedule to new Chapter Presidents and assign a direct mentor to each new Chapter President. Exercise responsibilities under the LAI Bylaw for the issuance and revocation of Charters for “at risk” local Chapters where the Vision, Mission, Principles, and Goals of LAI are jeopardized or have irrevocably collapsed by non-performance. Actions by LAI will include:
 - a. A pilot program to provide funding for administrative support at a level sufficient to administer LAI services in accordance with the goals of this Strategic Plan until the Chapter can do so on its own.
 - b. Assignment of mentor(s) for monthly outreach and recommendations on support, and resuscitation.
 - c. Assistance in identifying eligible prospective members.
- 4. Achieve Sustainable Membership Goal** – Chapters should have no less than 25 members by the following dates:
 - By June 2025, reduce the number of local chapters with less than 25 members by 33%;
 - By June 2026, reduce the number of local chapters with less than 25 members by 66%.
 - By June 2027, reduce the number of local chapters with less than 25 members by 100%.

SECTION 4

DEVELOPMENT OF NEW CHAPTERS

4.1. BACKGROUND

LAI seeks to advance the study and practice of land economics throughout the world by growing its network of membership. This can be accomplished by both expanding existing Chapters and developing new Chapters. As detailed in Section 3, Existing Chapters, a high priority of this Strategic Plan period is the preservation and growth of existing Chapters, especially those most recently created, that have not reached a level of sustainability. However, balance must be maintained.

If an exceptional opportunity for a new Chapter arises its potential should be presented to the LAI Executive Committee for guidance as to the availability of resources and the appropriate timing for pursuing the opportunity. This Strategic Plan supports the Board of Governors setting a limit to the number of new Chapters formed in the next five years, while existing local Chapters that are struggling are restored to a healthy position.

The pursuit of new Chapters is a resource-intensive activity by the New Chapters Development Committee. This includes focus by the RVPs/ARVPs, whose duties regarding new Chapter formation need to be balanced with ensuring the overall health of existing Chapters. International must ensure that the proper level of LAI resources is available, both financial and RVP/ARVP time allocation, to proceed with new Chapter development activities.

The New Chapters Development Committee is a standing committee of LAI with the mandated direction to assist in the formation of new Chapters. The Chapter Services Committee is responsible for supporting and nurturing existing Chapters. The Chapter Services Committee is to be kept apprised by the New Chapter Development Committee during all phases of chartering a new local Chapter. This is to ensure successful establishment of a new Chapter and that the Chapter Services Committee can provide continuous support and mentorship in the critical three year period following inception.

All Chapters created in the past 10 years continue to struggle with membership. One reason for this is a weak transfer of responsibility from the New Chapter Development Committee to the Chapter Services Committee. This transfer of responsibility must be strengthened so that once a new Chapter is formed it receives the appropriate level of support to become a healthy Chapter with a strong membership base.

The RVPs/ARVPs share responsibility for protecting LAI's interests in locating, developing, and chartering new local Chapters. The RVP/ARVP whose Region would cover the new Chapter will provide specific mentorship and attention to newly formed Chapters and assist them in reaching and maintaining a sustainable threshold of membership. This mentorship/oversight is to last at least through the first three years to ensure the new Chapter is on a solid footing. This mentorship/oversight will include periodic attendance of local Chapter Board meetings, Chapter events, and/or being an active member of a Chapter committee.

NEW CHAPTER FORMATION

The New Chapters Development Committee is responsible for assessing the potential for a new Chapter. The RVP/ARVP supporting the new Chapter is responsible for assisting in the formation process and preparing a detailed assessment on the viability of the proposed new Chapter.

Fundamental questions when considering new Chapters are:

- Can LAI thrive in this new location and will the principles on which LAI was founded be honored in the proposed new local Chapter?
- Will the new local Chapter reach out to its community and provide the kind of interactive forums, education and expertise that are hallmarks of LAI's Mission?
- Are there sufficient individuals identified within the geographic territory who meet the membership criteria and are interested in joining a local Chapter?
- Is there a minimum threshold of 15 initiates in the first year of formation with a plan to reach 25 members within 3 years?
- Are there sufficient committed individuals willing to serve as local leaders to bring about and sustain a proposed local Chapter?
- Can LAI provide support in the form of mentorship and attendance, where feasible, at events from the RVPs/ARVPs during the first three years of Chapter formation?

If the answers to these fundamental questions suggest good prospects for the formation of a successful new local Chapter, the New Chapter Development Committee will communicate with interested Chapter sponsors, identify LAI champions for the effort, form a Steering Committee, provide the group with the "LAI New Chapter Development Guide," and agree on a timeline and milestones for establishing the new Chapter.

4.2 ACTION ITEMS FOR NEW CHAPTER DEVELOPMENT

1. **Update New Chapter Development Guide** – Address the following and other relevant issues:
 - a. Minimum appropriate membership size for Chapter formation and target size to become a healthy Chapter.
 - b. Timeframe to reach a sustainable level of membership, including definition of a sustainable level of membership.
2. **Determine Strategy for Selecting Target Geographical Areas and Timing for Approval of New Chapters** – Determine the number of new Chapters that can be supported in a specific timeframe given available financial resources and the availability of the responsible RVPs/ARVPs to support the effort.
3. **Formalize RVP/ARVP Training for New Chapter Formation** – Clearly define roles and responsibilities for supporting new Chapters at the RVP/ARP level, both in the formation process and three-year support period.

SECTION 5

COMMUNICATION INTIATIVES

5.1. BACKGROUND

Historically, LAI has been purposefully internal in focus as an honorary society with programs, meetings and publications limited, primarily, to members and their guests. Modern shifts in how people receive information is impacting where they choose to invest their own time and resources outside of work and academic settings. The balance of internal versus external visibility and impact of LAI and LEF is a challenge to maintain and maximize relevancy of the society, grow member participation and support member recruitment.

INCREASING AWARENESS AND APPRECIATION

Elevating awareness and appreciation of LAI begins with better connecting and celebrating the skills and achievements of the Society's multidisciplinary members such that more people get to know one another. LAI is committed to reaching and connecting members in expanded and new ways to increase the value of membership through inter-chapter and international collaborations, media engagement, and communications support infrastructure.

Expanding recognition of LAI is a priority in order to broaden the Society's impact on important land economics issues and to recruit new members. LAI will build awareness through traditional and online media relations, social media posts and multimedia publications.

LAI may further increase its impact and visibility by engaging in periodic community service events that draw upon the expertise and experience of the Society's multidisciplinary membership. Socializing the planning, conduct and result of such activities is a powerful tool for expanding public awareness of the impact and visibility of the honorary Society.

MEDIA RELATIONS

Expansion of media relations at the International and local Chapter levels is critical to LAI marketing. Consistency and frequency of messaging across multiple formats is essential for media relations to be impactful. Adherence to official LAI Brand Standards for print and digital content is also essential in order to ensure consistency and professionalism in LAI products and messaging.

5.2 ACTION ITEMS

The Communications Committee shall have prime responsibility in effecting the marketing objectives which include:

1. **Develop Comprehensive Communications Plan** – Create a clear vision of the market for LAI communication vehicles, to identify how the market is to be reached, to identify the marketing goals, and to determine how success will be measured and assessed.
2. **Review Branding Materials** – Continue to evolve and promote consistency of brand formats for all communications, reports, media posts and other content. Review for currency, application and accuracy on a bi-annual basis.

3. **Update Communication Tools** – Expand the use of marketing tools, real and virtual, like video and social media channels to create and distribute content, reaching members in expanded and new ways, and to increase brand awareness through sharing with external professional networks.
4. **Ensure Consistency in Message** – Coordinate outreach initiatives of LAI to consistently implement communication of policies, language, advisories, and practices approved periodically by the Board of Governors.
5. **Post and Socialize Content** – Provide ongoing virtual access to event and program content via the LAI 'YouTube' channel, LAI and Chapter websites, and KeyNotes articles in coordination with the LAI comprehensive communications plan.

SECTION 6

GLOBAL INITIATIVES COMMITTEE

6.1. BACKGROUND

As part of this 2023-2027 Strategic Plan, International is building on the growing popularity of programs that reach across Chapter boundaries and building on the foundation of the Global Chapter, as defined in the LAI Bylaw in effect in 2021.

The COVID-19 pandemic has demonstrated the technical capacity and willingness to participate in programs and activities across Chapter boundaries. Recent webinars have provided an ideal forum to reach a broader audience with the findings from various research projects including those sponsored by the Land Economics Foundation (LEF). It has also highlighted the wealth of talent within the LAI membership and the LEF-funded researchers. Global programming presents the opportunity to share the richness of LAI members' and researchers' expertise, much of which has value beyond the local Chapter boundaries, on a low-cost basis to the broader LAI membership.

LAI talent should be the first choice for future cross-Chapter programming, while not excluding outstanding thought-leaders from outside the LAI family where there is a clear value-add proposition to LAI membership.

While the Global Chapter has had important successes supplemented by an ad-hoc committee, both have had a governance continuity gap. The Global Chapter and the ad-hoc Committee are initiatives that would benefit from:

- Clarity of purpose for global initiatives as a supplement to local Chapter offering.
- Permanent committee status.
- Continuous recruitment of LAI members to cross-Chapter and global programming and membership on a permanent oversight committee.
- Regular presence at LEW events.
- Budget to sustain goals.

The Global Chapter name should be changed to Global Initiatives Committee to complement the relationship with the local Chapters. This will clarify that cross-Chapter programs are intended to complement, and not compete with, local Chapter programs. 'Initiatives' is an intentionally broad term to incorporate more than simply the program events.

6.2. ACTION ITEMS

1. **Create the Global Initiatives Committee** – Establish as a permanent Standing Committee of International.
2. **Finalize Global Initiatives Policy for Board of Governors Approval** – Once the policy is approved, the Committee would evaluate initiative proposals and submit recommendations.
3. **Provide Forum for LEF Research** – Facilitate knowledge exchange via a forum for presenting results of LEF-funded research to reach a broad audience of interested members.

4. **Provide Forum for Events on Specific Topics Across Chapter Boundaries** – Build upon demonstrated success in the past year via the Color of Law series, Rethinking Suburbia and the 2020 Economic Update.
5. **Facilitate Global Access to Local Events** – Work with local Chapters to provide global access to local events which may be of significant interest beyond the local Chapter. Sacramento's COVID-19 series in May/June 2020, Austin's Tesla impact event and the Baltimore/Rotterdam architecture series provide excellent examples.
6. **Provide Programs and Forums for At-Large Members** – Provide opportunity for At-Large members to gather virtually to discuss topics of mutual interest; invite At-Large members to contribute to program ideas and webinars, including moderating Global Initiatives; and provide for At-Large member specific representation on the Global Initiative Committee.
7. **Create LAI Standing Committee for Global Initiatives** – Work in close cooperation with LAI invitational in-person engagements, LEWs and regional meetings.
8. **Prepare Guidelines and Policies for Local Chapter/Regional Webinars** – Prepare and recommend a "Production, Content and Quality Control Policy," or other directive, to protect the interests of the LAI corporation, inclusive of use dissemination advisories, disclaimers and attributions consistent with applicable regulations and best practices, as an aid to the broader use of 'virtual' format audio, visual and published materials.

SECTION 7

BUSINESS MEETINGS, LAND ECONOMICS WEEKENDS, PROFESSIONAL ADVISORY DELEGATIONS AND REGIONAL / INTERREGIONAL MEETINGS

7.1. BACKGROUND

Land Economic Weekends (LEWs), held in conjunction with semi-annual LAI Business Meetings, have a twenty-one-year history. Although they deliver many valued benefits to the organization, they also constitute LAI's second most costly investment of Member dues.

As part of the Strategic Plan review process launched in early 2021, a comprehensive review of Land Economics Weekends (LEWs) and Professional Advisory Delegations (PADs) policy was conducted. A membership canvass, an ad-hoc committee report and ensuing consideration held in conjunction with Global Initiatives and Membership committee reviews yielded significant new directions for LAI as set forth in this section of the Strategic Plan.

7.2 ACTION ITEMS

1. **Create a New LAI Standing Committee** – Create an "Assemblies Committee" to focus on in-person LAI invitational engagements, including LEWs, regional and interregional events. The Assemblies Committee will:
 - a. Have a five-year (5) time horizon planning mandate to canvass, publish and prepare for a minimum of one (1) annual host community LEW sponsorship event.
 - b. Receive, advance and recommend, for LAI Board approval, the convening of in-person PADs, as well as in-person regional, sub-regional or interregional meetings. The responsibility will include panel selection and the conduct and oversight of possibly one (1) invitational PAD event every 3-5 years, in conjunction with a LEW event or otherwise.
 - c. Prepare policies and protocols for structuring, recruiting, reaching out and augmenting local Chapter planned host community LEWs. The protocols and policies, for LAI Board approval, will address coordination, marketing, guiding, and supporting LEWs, conducting PADs and encouraging and assisting in the conduct of regional, sub-regional and interregional in-person meetings.
 - d. Prepare with local Host Chapter input, and recommend for LAI Board approval, revisions to the Memorandum of Understanding attendant LEW in-person events, to better reflect and improve the clarity of shared and own responsibilities.
 - e. Prepare with local Chapter and Communications Committee input and recommend for LAI Board approval an enduring 'Strategic Marketing Plan' to be conducted in advance of LEWs, PADs, regional or sub-regional and interregional meetings.
 - f. Secure provision in each LEW for an available Global Initiatives component.

2. **Maintain One In-Person Business Meeting Annually, with the Land Economics Foundation (LEF) –** This in-person Business Meeting would be held in the Fall, likely in conjunction with the annual Land Economics Weekend. An in-person Presidents' Roundtable should continue to be held in conjunction with the Business Meeting and associated LEW.
3. **Restrict Agenda** – The in-person Business Meeting should have a restricted Agenda basis dealing only with elections, disciplinary matters and corporate affairs (including discussion on identified issues) of compelling magnitude. All other corporate Business Meetings, Standing and Ad Hoc Committee Meetings, meetings of the Executive Committee and LEF Board of Directors will be pursued, on Notice with set Agenda's, to proceed virtually in sessions not to exceed two hours.

SECTION 8

LAND ECONOMICS FOUNDATION

8.1 BACKGROUND

The Land Economics Foundation (LEF) is the Trustee of a special Fund created by LAI on January 8, 1965, when it placed into Trust monies intended to be used to support the study, awareness, and advancement of land economics. As Trustee, LEF manages the LEF Fund and administers the foundation's primary activity – funding grants to enable proposed research, projects or activities globally that meet the objectives and purposes of LAI.

Today, the LEF Fund is derived almost entirely from the contribution of LAI members and the earnings from its investment. The most recent financial report [October 2021] showed that the Fund had assets of over US\$700,000. LEF recent annual total granting of funds to projects over the last few years has ranged between US\$25,000 and US\$52,000 averaging approximately five percent of the Fund annually. Granting of funds to individual projects during the same period has ranged from a low of about US\$5,000, to a high of about US\$20,000 with average funding per project being about US\$10,000.

The annual contribution from members has ranged between US\$23,000 and US\$35,000. It should be noted that in recent years more than 50 percent of the total annual donation is received from members of only four Chapters. At the other end of the scale, there are 15 Chapters (more than half of all chapters) whose members together donate less than 10 percent of the annual total of funds received.

Following the completion, in 2018, of the most recent prior LAI Strategic Plan, it was noted that in the Strategic Plan there is little mention of LEF, nor any significant strategic direction provided for its engagement with LAI. A membership survey confirmed that only a small minority of LAI members were aware of the purpose and work of LEF and that many members did not see value in contributing to it.

It was the conclusion of the LEF Directors that there would be benefit in a more concerted effort to significantly raise the profile of LEF. Accordingly, the LEF Directors have endeavoured to create and implement various new measures to better expose the valuable work of LEF to LAI members and to raise the awareness of LEF to the academic and research community.

LEF STRATEGIC GOALS

1. LAI members will understand and appreciate the importance of the LEF Fund in fulfilling LAI's object and purposes. As the Trustee of the LEF Fund, LEF will be widely acknowledged as a vital, integral, and contributing constituent of LAI.
2. LEF will be an effective value-adding action-oriented arm of LAI and will be recognized by LAI members and land economics academic, practitioner and professional communities.
3. LEF will engage in enhancing and supporting LAI purposes and functions by funding projects intended to develop and/or employ land economics principles with the intention of contributing to the betterment of society.

8.2 ACTION ITEMS

- 1. Initiate an LEF Annual Funding Appeal** – LEF and LAI will conduct this appeal to LAI members jointly and accompany it with issuance of an LEF annual report.
- 2. Conduct Annual Webinar** – In collaboration with LAI, LEF will create, promote, and deliver an annual (and recorded) webinar with an invitation extended to all LAI members in which to present the work of LEF and available opportunities.
- 3. Solicit Planned Gifts** – LEF will develop and implement an approach to requesting/encouraging and recognizing larger individual contributions, bequests and in-memorial donations.
- 4. Investigate Tax Advantage for Contributors** – LEF will investigate the feasibility of making donations by Canadian members tax deductible.
- 5. Grow LAI Involvement in LEF Projects** – LEF will encourage and facilitate LAI members to donate time and talent to LEF projects.
- 6. Fund and Support Related Programming** – LEF will collaborate with LAI, its Committees, and the local Chapter to fund LEF approved programming in assemblies, symposiums, charrettes, and panels. LEF shall encourage the submission of grant applications related thereto.
- 7. Support LEW-Related Programming** – LEF will encourage Chapters seeking to host a LEW to submit a grant application to support LEW-related programing (symposiums, charettes, panels, etc.) which reflects LEF research priorities and to clearly identify the value proposition in its application.



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