

LAMBDA ALPHA INTERNATIONAL

The Honorary Land Economics Society

STRATEGIC PLAN

April 3, 2008

1. BACKGROUND

This plan memorializes the results of months of discussions within the Executive Committee that culminated in a formal planning session undertaken in Ottawa, Ontario, Canada during the fall of 2006. The purpose of the meeting was to establish some guidelines for Lambda Alpha International for the next ten years. Each of the following sections presents a question as to the role, mission or objectives of the Society. The text documents the consensus of the planning committee. In some cases it focuses on clarification of the question. In others discrete action items follow.

2. THE MISSION

2.1 What is the mission of LAI?

The purpose and mission of LAI is to advance the study and practice of land economics – the practice of designing, developing, valuing and husbanding the use and maintenance of real property as a social good. As an honorary organization established to recognize and facilitate interaction among the leaders in all professions contributing to land economics, LAI strives to encourage shared knowledge among its members and to encourage them to create, support and participate in educational and training activities aimed at promulgating sound land economic practices. LAI seeks to foster highly ethical practices and encourage learning and exchange among its members through meetings, discussions, social interaction and community activities organized at a local chapter level and through international meetings and events.

2.2 What Does LAI do?

LAI exists as a vehicle to aid in the development and sharing of the principles and practice of land economics among its members. It provides a forum for the transfer and debate of land economic principles, concepts and projects among the variety of professions that constitute the practice of land economics such as architects, city planners, developers, appraisers, attorneys, real estate professionals and government officials. Its meetings, events and publications provide a platform to facilitate such discussions, encourage learning and personal contact and honor the significant contributions of relevant professionals.

3. THE MEMBERS

3.1 Who are the members of LAI?

LAI members are those individuals who are recognized within their particular discipline as professional, practical and academic leaders. Membership is through invitation and requires all candidates to demonstrate their contributions to the community and to their profession. This is determined through a candidate's demonstration of substantial experience that also gives evidence of local leadership, and demonstrates ethical and professional achievement

3.2 What do LAI members gain from the organization?

LAI provides forums for its members to learn and discuss issues of common concern in collegial settings. Because it consists of some of the most respected persons in their disciplines these conversations, workshops, lectures and social opportunities facilitate personal growth and create challenging opportunities for peer to peer discussions which give them a broader understanding of how their professional endeavors affect conditions in society. Further, as an organization of select, elected membership, members receive and share in recognition as the leaders of the land economics industry. All of this provides LAI members with a broader base of peer level professional contacts and a broadened social network.

3.3 Why belong to LAI?

LAI allows members to gain personal satisfaction from being a member of an elect community of their peers. Through the social and educational components of membership members have ample opportunity to stimulate their intellectual curiosity and give back to the community in the form of better professional decisions and communitywide educational and service opportunities. Further, the interactions between knowledgeable colleagues, presentations, workshops and discussion forms provided at the local chapter and international level provide continuing insights for each member as to how to make better land use and real estate decisions. Last, but not least, LAI allows members to establish a broad and deep social and professional peer network of colleagues in their city of residence as well as in all communities which host a LAI chapter.

4. THE ROLE OF THE INTERNATIONAL SECRETARIAT

4.1 How does LAI serve its membership?

Each local chapter offers a range of networking, educational and community service activities that are available to all members. Further, the International office supports and provides a range of services to the chapters and individual members through the provision of web based publications, an awards program, the maintenance of the Land Economics Foundation and the support of twice a year international networking and educational programs held in host cities and open to all members.

4.2 Beyond its secretariat role, what can the International do to foster a better exchange of information among the professionals who are members?

The role of the International Office of Lambda Alpha has changed over the years. Historically, the International Office (hereafter, "International") largely collected dues for chapters, published a newsletter, *KeyNotes*, and managed the semi-annual meetings of the Society. The Board of Governors provided guidance for the operation of the Society, but its role was largely defined by the International and its staff. About ten years ago, a more activist group of directors challenged the established policies and in 2000 replaced the company that managed Lambda Alpha for many years. The current management company, Association Management Systems, Inc. (AMS now Integrated Solutions, Inc.) has served as the International since 2001.

In addition, the Board of Governors, through its executive committee has taken a more active operational role in managing the Society. Accordingly, both the Executive Committee and the Board of Governors have more direct control of the Society.

To that end, the International has recently provided a new organization manual to all chapters so they can now operate in similar fashion with one another. The International provides insurance for directors and officers of those chapters that are not incorporated, collects both international and, for chapters that desire it, chapter dues as well. It maintains our website, maintains membership records and keeps them up-to-date, it assists the International Scribe in publishing both the Internet and print versions of our monthly newsletter, *KeyNotes*. It maintains the records of the Society, and it provides a central location where all chapters can come for information and help in maintaining their branch of the Society. It conducts semi-annual meetings that afford interested members the opportunity to meet members from other chapters, tour developments in host cities and develop a broader professional and social network.

LAI sees itself as a confederation of chapters rather than as a centralized organization. This is, in part, due to the nature of the chapter form of governance as well as the reality that LAI business is fundamentally conducted at the chapter level in local meetings by professionals known to each other in their communities. Nevertheless, the International plays a vital role in holding Lambda Alpha together as a Society. Our greatest asset is our ability to bring knowledgeable professionals from all aspects of the land economics professions together to share information and to learn from one another on neutral ground. The International facilitates this activity by providing a linkage between chapters as well as offering opportunities for chapter members across our Society's geographical reach to know, learn and engage one another in professional discourse.

Thus, the role of a Secretariat is increasingly important as the Society grows, as new chapters form and as we seek common linkages with one another across nations and continents. The International provides a vehicle for us to broadly share our understanding of issues, approaches and activities, which affect the art and science of our professions. To that end, our semi annual meetings provide a forum to engage members throughout the world. Were it not for the role of the International, we would simply not be able to facilitate these connections for interested members.

Our aspirations for the International are that it will do the following:

- Continue to improve the nature of communication between chapters using both print and electronic media
- Devise or adopt new means of making those connections viable
- Help the Society to create new methods of explaining Lambda Alpha to potential members
- Assist the Executive Committee in developing sites for new chapters
- Improve its promotional skills in helping us to publicize the good work of Lambda Alpha through both international and chapter events
- Continue to provide forums that bring together membership interested in furthering their professional and social contacts beyond that of their chapter cities.
- Continue to provide opportunities for members to explore and learn about land economic projects in cities across the world.
- Continue to play the essential role of being the common link between chapters and our distinguished members

5. NEW CHAPTER DEVELOPMENT

5.1 Where should we be a force in land economics issues in the next ten years?

LAI should seek to influence the direction and coordination of professional thinking in all disciplines represented by its members. It should seek locations in communities large enough to permit LAI to flourish, have a strong academic base and to the degree possible should seek locations that lack similar organizations. As a volunteer organization with limited local staff capability, LAI can only be a force in a community if there is a strong leadership cadre that can organize and continue a chapter. To build such a cadre, LAI should examine the migration patterns of its present members, examine the growth strategies used by recently formed chapters and systematically identify leadership from academia, business and government as sources of members. Further, it may be useful to look to those of its members who are part of multi-city corporations and whose resources can be used to facilitate the organization's growth

To expand its influence in communities LAI should seek to increase its exposure by undertaking joint programs with similar organizations (ULI, APA, CRC, etc). It should also sponsor speaking, information or professional exchange programs unique to the area, which may include noted local or nationally recognized persons as a draw.

Among prospective communities which appear to have the highest potential for LAI Chapters are:

- Atlanta
- Belfast
- Dallas
- Denver
- Dublin
- Las Vegas

Other areas and nations which merit attention are:

- Austin
- Calgary/Edmonton
- El Paso
- Houston
- India
- Ireland
- Korea
- Miami
- Orlando
- Portland
- Scotland

- Tampa
- Tucson

In all cases, any programs to create new chapters should have at least 100 member chapters as a goal. Chapters of this size provide the mix of individuals and the financial resources to organize and maintain strong programs.

5.2 How should we establish new chapters?

1. Initial leadership. Any attempt at new chapter formation requires at least one local individual with strong contacts in various disciplines that is willing to take the leadership responsibilities for organizing the chapter.
2. This leader may request International for assistance in chapter formation, or LAI might identify a potential leader based upon current member interest. In either case, once International recognizes that there is interest in establishing a new chapter the Regional VP should meet with the leader and any core group that is established.
3. The Regional VP should alert the International office to poll the international membership to determine if current members know of any individuals within the target city who might be interested in LAI membership. This information should be provided to the regional VP and the local initiator.
4. The regional vice president, working with the initiator must identify at least 20 individuals, including local at large members, who can represent the incorporating core of membership. Such individuals might best be drawn from similar organizations larger than LAI, but lack the exclusivity and recognition that can be ascribed to LAI. An organizing dinner, supported by International should be held wherein the regional vice president can explain LAI to interested parties and help these individuals further seek founding members.
5. The initiator(s) should be invited and hosted by International to attend a Land Economics Weekend to learn more about LAI
6. The regional VP and the initiator should review key multi city corporations and other major real estate companies within the target city to determine if sponsorship interest can be found to support a major promotional and incorporation event.

7. The regional VP should work with the initiator to plan and hold an incorporation event wherein the new chapter is chartered and new inductees sworn in. The goal should be to have a minimum of 30 inductees. If timely, International should consider scheduling the holding of a Land Economics Weekend Experience in this target city concomitant with the new chapter incorporation dinner.
8. The International should provide information to the initiator as to the processes to be used to initiate the chapter. Assistance should be provided as necessary regarding setting up books, securing rosters, establishing a chapter web site. These processes should be contained in a New Chapter Formation manual to be developed and promulgated by the International. Financial resources in the amount of \$3,000 should be made available to the new chapters use in holding the initiation event and initiating the chapter.

6. PROVIDING EFFECTIVE CHAPTER SUPPORT

6.1 How can we help sustain those chapters that have fewer than 100 members but are viable? What about those that appear to be limping?

6.1.1. Leadership Issues

The success of any chapter depends upon strong and committed leadership. Leadership means drawing in and securing the cooperation of other members to maintain and grow the chapter. No leader can last forever, and sometimes the lack of leadership change can result in shrinking chapters. The existence of only one leader is a leadership problem.

As International determines that a chapter has a leadership problem it should undertake a program of the following actions.

1. The regional VP should attempt to hold a meeting with at least five chapter members to discuss chapter issues and needs.
2. In cases where this minimum cannot be secured, the regional VP, following a conversation with the nominal leader should undertake a calling program to listed chapter members to determine interest and problems. The regional VP should communicate the findings with the nominal leader and try again to secure a meeting with a group. This may require holding a meeting in the absence of the nominal leader

3. As a result of this meeting, if organizational difficulties are determined, or if resources are below what is needed to breath life into the chapter, the regional VP should petition the Executive Committee of LAI to secure funds to support a suggested program of effort offered by the regional VP. This may involve having International support a major dinner with speaker at which the chapter can test its viability. All existing members should be invited, and the regional VP working with available leadership should attempt to secure an invitation list beyond current members, which could have the effect of exposing more potential LAI members to LAI.
4. New leadership should be secured through the above dinner organizing process.
5. If the chapter is completely moribund, then the Regional VP should follow the steps of new chapter creation working with an individual who is willing to commit time to resurrect the chapter.

6.1.2. Growth Issues

For chapters that are viable but are smaller than desired International should help by simplifying recruitment and providing resources for outreach. This might involve

1. Making each chapter aware of a recruitment goal (say 100 members)
2. Using a simplified membership application process, perhaps CV only
3. Providing a recruitment checklist
4. Providing names of lost or inactive local members
5. Using the resources of International to host a large and prestigious event that seeks attendance from beyond the usual chapter sources.

If a small chapter is not viable and shows no signs of life (say less than 25 members) International should remove the charter and provide at-large status to all present members.

6.1.3. Status of small chapters (as of October 2007)

| | <u>2005</u> | <u>2006</u> | <u>Status</u> |
|---------------|-------------|-------------|---------------------|
| Aloha | 56 | 60 | viable |
| Baltimore | 44 | 35 | encourage growth |
| Boston | 35 | 40 | needs assistance |
| London | 44 | 42 | needs assistance |
| Minnesota | 69 | 83 | may need assistance |
| New York | 20 | 16 | needs rebuilding |
| Orange County | 59 | 64 | encourage growth |

| | | | |
|--------------|----|----|------------------|
| Ottawa | | 20 | encourage growth |
| Philadelphia | 64 | 49 | encourage growth |
| Puget Sound | 16 | 14 | needs rebuilding |
| Sacramento | 75 | 77 | viable |
| Vancouver | 68 | 77 | viable |

Regional vice presidents should take the initiative in meeting with local chapter leadership to determine the actions that might lead to chapter growth and or revitalization. The International should determine a program of assistance for rebuilding a chapter on a case-by-case basis. However, given the limited resources available, such rebuilding actions can at most be provided to only one chapter at a time. The determination of which chapter to assist shall be a decision of the International based upon overall impact to the society.

6.2 What should we do for Chapters?

1. Help set up chapter websites
2. Inventory and share chapter activities
3. Create an education program
4. On-line library
5. Travel discounts for Land Economics Weekend meetings to enhance attendance
6. Serve as a source of ideas to chapters for programs and recruitment
7. Share idea, program and speaker resources among chapters
8. Provide access to funds for chapter interaction
9. Operate a speaker's bureau drawing from LAI membership willing to travel and speak on subjects of expertise
10. Link & archive chapter presentations
11. Provide recording devices to memorialize chapter lectures and presentations (LEF Funding)
12. Disseminate monthly lists of chapter presentations collected by Regional Vice Presidents and Assistant Vice Presidents
13. Keep Board of Governors aware of chapter activities by placing them on each chapter's distribution list
14. Provide chapters administrative assistance (perhaps fee based if not uniform to all chapters)
15. Train chapter leaders in administration and leadership
16. Identify and share successful program ideas developed by chapters with all other chapters.

7. MARKETING LAMBDA ALPHA

7.1 How should LAI go about marketing itself?

LAI views itself as an exclusive and elite organization of leaders and experts in land economics. However, exclusivity does not exist in anonymity. We must increase awareness of LAI within our related industries, disciplines, chapter cities and countries. Therefore it is critical to the mission of LAI to make the Society known in a manner that reflects our desired image of LAI.

Marketing of LAI begins with having the membership well aware of the nature and purpose of the organization, its geographic distribution, its history, and the value of its elected, honorary character. This can be helped through the continued provision of information about LAI to membership through brochures, articles in KeyNotes and Online Keynotes and “indoctrinating” members regarding the value and merit of LAI membership at chapter meetings. In addition, international should act to initiate a number of marketing and marketing enhancement activities such as the following:

7.1.1 Increase LAI exposure

A key aspect of marketing LAI is increasing its exposure to the broader industry. Hosting or co-hosting events having high visibility, reflecting the elite position of LAI members within their disciplines and community can be a useful approach to marketing. Some examples include:

1. Work with other organizations to create an Annual Economic Summit Meeting by Real Estate firms
 - a. -LAI to be a sponsor
 - b. -LAI members to serve as experts at those meetings
2. Host annual remarks by chapter city mayors or similar civic officials at chapter meeting
3. Sponsorship of public lectures on Land Economics
4. Sponsor radio broadcasts on Land Economics

7.1.2 Enhance the LAI Award Program

The award program can be an effective form of outreach and marketing if our market is aware of it, and learn to value the awards and awardees as important “news” Some ideas to bring this about are:

1. Publish information about LAI Awardees in key local and national media
2. Prepare press releases about LAI Awardees and send to news outlet in awardees home cities
3. Recognize LAI members in KeyNotes when they receive Non-LAI Awards

7.1.3 Support Public Relations Efforts

An ongoing public relations program at the International and chapter level is critical to our marketing effort. Some activities to enhance this effort include:

1. Establish a standard LAI Press Release form and distribute to all chapters
2. Prepare a standard paragraph describing LAI to be included in all LAI press releases
3. Prepare a national media mailing list and suggest to all chapters a similar format for local media mailing and contact.
4. Distribute KeyNotes outside of LAI
5. Tie LAI Affiliation of Members into their “credits” when they speak to/lecture to other groups

8. IMPLEMENTATION

Within the above seven sections of this plan are embedded a number of action items of various scales. They fall logically into the following groups in no particular order. Nevertheless, these are the issues on which we believe Lambda Alpha International must focus its attention in the next five years. They are:

1. Grow the membership of LAI
 - This is a priority both for chapters and for the organization as a whole. With a membership of 4,000 to 5,000 members, we will be able to enrich our international support to chapters without drastically increasing the international dues.
2. Assist chapters to grow their membership to a minimum of 100 members per chapter
 - As we have identified above, some of our chapters are substantially below the 100-member level that we have generally found to be a minimum for long-term chapter viability.
 - The International should recognize this as a priority both for chapter development and also as a way in which the international can demonstrate its commitment to a robust chapter culture.
3. Fully respect and encourage the international nature of our membership
 - Because of our international nature, it is especially important to acknowledge and honor the diversity of that membership our activities and publications.
 - We recognize that land economics professionals in other countries may approach the organization and structure of LAI relationships in a manner different from each other. We should find ways to

- accommodate requests for affiliation and membership that reflect the culture of other countries.
4. Develop and formalize protocols delineating the relationship between the International Secretariat and Chapters for Land Economics Weekend events.
 - The Executive Director and the International Board of Governors must establish a format for carrying out Land Economics Weekend events such that the roles of the Executive Director and Chapter representatives are clear in advance of these events.
 5. Improve coordination between the LAI Board of Governors and the Lambda Alpha Land Economics Foundation (LEF)
 - Develop a standard operating procedure for the LEF.
 - Establish standard meeting, proposal solicitation and funding review protocols for the LEF and implement them by the autumn 2008 LAI Board of Governors and Land Economics Foundation meetings.
 6. Expand the LAI public relations effort
 - Develop links between LAI and other land use organizations.
 - Assist chapters to better publicize their events consistent with the recommendations in Section 7 above.
 - Improve the marketing of LAI.
 7. Enhance the role and responsibilities of Regional Vice Presidents
 - They are the link between the Board of Governors and the chapters and are vital in unifying the organization.
 - Their responsibilities should be emphasized to nominees for the position.
 8. Develop a VOIP (voice over internet protocol) procedure for communicating in conference calls
 - With such a far-flung organization, our most effective means of coordination is via the telephone. However, with new technology, we can now use VOIP as a much lower-cost alternative than standard conference calls. This is especially important when we have overseas officers.
 9. Formalize a New Chapter Development manual
 - Make it available to those seeking to establish new chapters of the Society.
 - Ensure that the manual is produced in high quality consistent with the dignity of the Society.
 10. Encourage research about issues pertinent to land economics.

Growing out of an academic environment, this is implicit in the role and mission of LAI. We must continue to encourage and support research in learning in land economics through support of publications and programs within the Society and find ways for chapters to join in common discussions regarding overall issues where appropriate.

9. CONCLUSION

For the past 78 years, Lambda Alpha International has invited distinguished practitioners, academicians and students in the land economics professions to join with one another, share knowledge and friendship while seeking to enhance the function of our urban spaces. Growing from a single chapter in Chicago, the Society now reaches from Europe to Asia through 21 chapters with new chapters currently in formation.

While the strength and diversity of our Society is found in the robust culture of our chapters, it is the International and our Secretariat that unites us into Lambda Alpha International. The Strategic Plan that you hold is our effort to provide guidance to the Society as it grows and develops over the next few years. We hope that future Boards of Governors and Executive Committees will take our efforts as a starting point to annually review, revise and amend this strategic plan to keep it a living document as it seeks to guide the future growth of our Society. In that respect, we wish our successors only the best.

Leslie S. Pollock, FAICP, International President
James A. Fawcett, Ph.D., International Past President

Roger Kallman, AIA, International Past President
Larry Lund, International Past President
Karen Sieracki, Ph.D., International First Vice President
David Lachoff, International Treasurer
Gary R. Leach, International Assistant Treasurer
Phillip Kolbe, Ph.D., International Secretary
Laurie Madigan, International Assistant Secretary
Helen Sause, International Scribe
Tara Balfe Clifford, International Assistant Scribe
Robert Gibson, Europe Region Vice President
John Dallimore, Europe Region Assistant Vice President
Ackneil M. Muldrow, II, East Region Vice President
Louis J. Slade, P.E., East Region Assistant Vice President
Ian Lord, Esq., Midwest Region Vice President
Cassandra Jansen Francis, Midwest Region Assistant Vice President
David Greenwood, RICS, West Region Vice President
Tim R. Youmans, West Region Assistant Vice President
David L. Callies, FAICP, Pacific Rim Region Vice President
Anilkumar Hatkar, Pacific Rim Assistant Vice President
Fereydoon Ghaffari, Advisor to the International President

LSP: JAF