

# Campus FM Technology Association STRATEGIC PLAN 2019-2024





# Letter From the President



Dear CFTA Community,

To be truly successful today, we must honor our history and learn from the lessons of our predecessors. Established in 1990, originally as the National Collegiate CAD Conference (NCCC) to bring campus CAD users together, the Campus FM Technology Association has witnessed a variety of FM technologies come and go. Presently at 29 years old, our association's strength was built by the many evolutions of leadership, relationships and service offerings throughout the decades.

Today I am proud to add another historical milestone to our legacy, presenting our Five-Year Strategic Plan for the CFTA community.

Beginning in 2017, the strategic planning process and its subsequent development is now complete. The effort undertaken involved both public and private surveys, focused leadership meetings, consultations with industry experts, and thorough document development. Intentionally designed to reflect the collective views of the Board of Directors, officers, members, and constituents, this plan presents a combined vision for how CFTA may grow to best support the community at which it is designed to serve.

Just as our members must continually learn to use new technologies and be flexible to apply different techniques, CFTA must also adapt and provide service offerings that align with the needs of today's campus FM professionals. Through this strategic planning initiative, CFTA will dedicate its focus to design service offerings that are intended to best support members' needs, while equipping future leadership with the necessary tools to be successful.

I believe the 2019-2024 plan presents a shared vision for the future - one that will successfully guide us to meet our mission while staying true to CFTA's core values.

Sincerely,

A handwritten signature in black ink, appearing to read 'Michelle Ellington'.

Michelle Ellington, President  
Campus FM Technology Association





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# Introduction

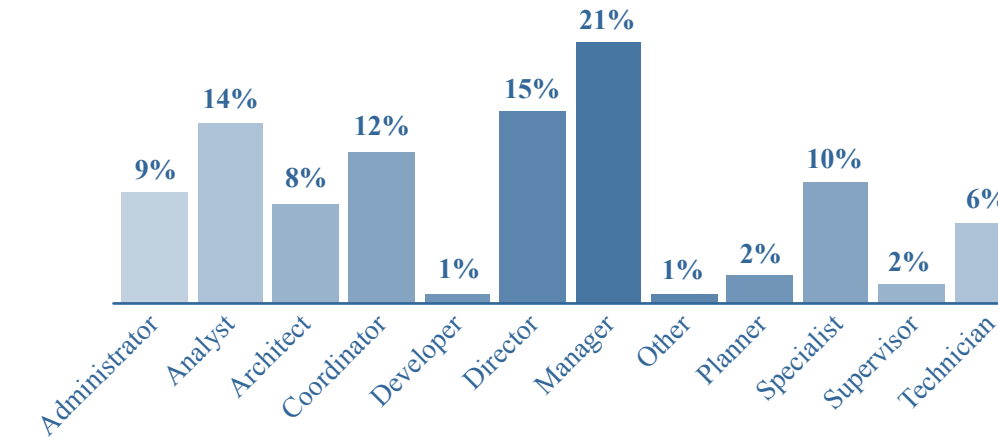
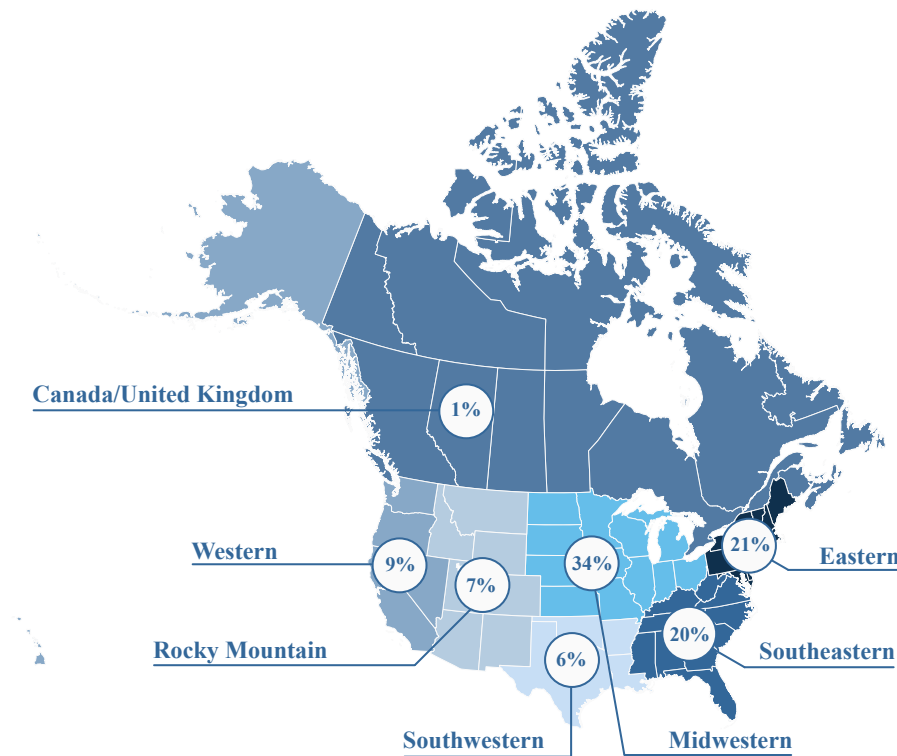
## History

The Campus FM Technology Association (CFTA) exists in the combined talent and experience of its members and their willingness to use their knowledge to serve one another through sharing and collaboration. The association's unique character lies in its focus on the development and application of technology tools across multiple disciplines for the planning, development, maintenance and management of campus facilities.

The association has evolved significantly over the past 29 years. Originally founded by a small group of campus FM CAD users meeting annually to embrace the once-transformative design tool, CFTA has grown into a medium-sized association of leaders and innovators of campus FM technologies. The constant over all of these years is its people's willingness to passionately work together, implementing foundational FM technologies and staying abreast of disruptive ones.

## Community

As of March 2019, CFTA has 232 active members consisting of 72 individual campus institutions worldwide, along with 40 commercial business partner organizations and global solution providers. Over 500 ListServ subscribers offer daily chatter, seeking out questions and providing answers to a variety of complexities involved with employing FM technology.



The association's resources and services serve to enable both members and non-members to succeed in their roles as FM technology professionals. Conference recordings and reports are released to members upon initial publication and then released to the public one year after publication. Free public webinars occur year-round and an annual conference brings our members together to share their professional successes and learning experiences through FM technology breakout sessions and roundtable strategic discussions.

## Operations

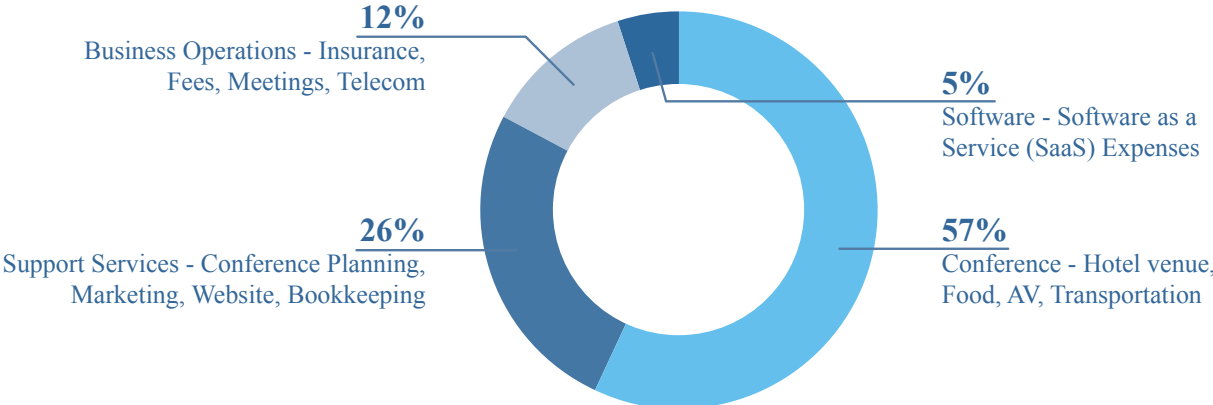
A support team of paid, part-time individuals who report to the CFTA President, runs the association's day-to-day business operations. Within the past couple of years, a website administrator, marketing and outreach coordinator, accountant, bookkeeper and conference planners have been new additions to CFTA. In addition, the Board of Directors, officers, and task force members are volunteers that dedicate well over 1,000 hours of combined time annually to support the association's success.

Together these individuals are growing CFTA's resources and services that support the mission of the Association and community at large.

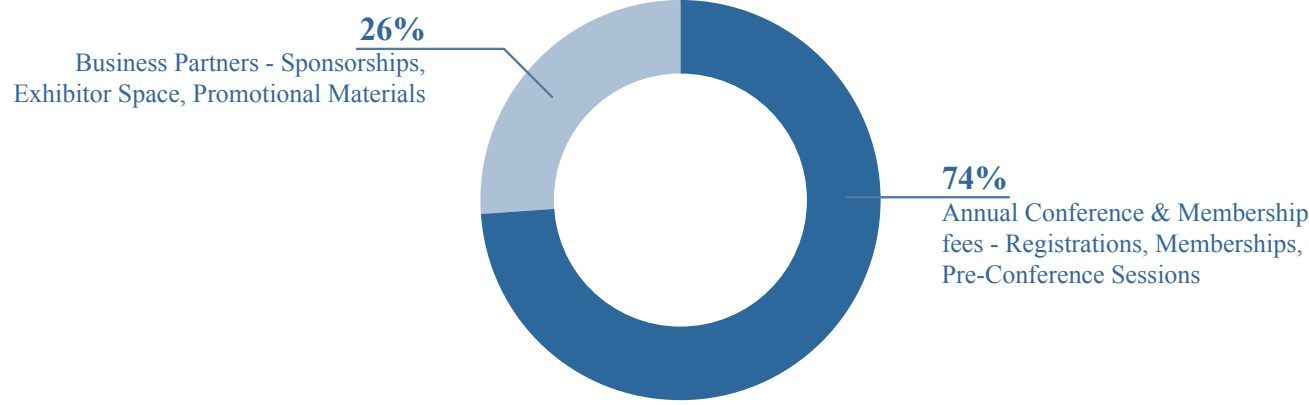


# Introduction (Cont.)

CFTA's projected 2019 operating budget is broken down into four primary areas: conference, support services, business operations and software.



CFTA's two sources of revenue are generated by our members and our business partners.



## Future

In 2010, CFTA nearly became insolvent due to impacts resulting from the 2008 economic downturn. The 2010 conference was cancelled, marking a time of consequence and concern in the history of CFTA. In fact, the association itself survived due to the actions of a handful of dedicated members.

Over the past four years, significant organizational restructuring has resulted in steady growth and CFTA is now poised and ready to embrace an expected evolutionary phase.

The goals outlined in this strategic plan are intended to drive the changes needed to create added value to our members, as well as establish a sustainable foundation for the association's future leadership to thrive.





# Mission, Vision and Core Values

## Mission

Connecting professionals to share ideas and information that improve the management of campus facilities.

## Vision

Be the professional association recognized as the community authority on the application of technology in campus FM (Facilities Management) enterprises.

## Core Values

CFTA has three core values to guide its plans, decisions and actions as shown below:

<b>Sharing &amp; Collaborating</b>	By passionately sharing information and working together we challenge each other to improve and achieve the highest level of professional excellence.
<b>Connectivity</b>	Invest in relationships that effectively lead to innovative solution designs and strategies to meet the changing frontiers of campus FM technologies.
<b>Respect</b>	Show respect for campuses of all sizes, respect for different solution strategies, respect for business partners.





# Strategic Planning Process

Strategic planning is a process an organization follows to help define a desired direction, establish goals and identify tactics that ultimately become a roadmap leading to successful outcomes. It is a tool to improve priority setting and designed to be flexible, allowing for unexpected challenges that will inevitably appear during the multi-year planning timeframe.

## Timeline:



**June**  
CFTA leadership sought strategic planning guidance.

Over a series of several months, CFTA Leadership held numerous consultant-led strategy sessions to develop meaningful survey questions aimed at association-specific measurement points.

**May**  
CFTA launched an environmental scan/SWOT analyses by publishing two strategic planning surveys: one for leadership and another for members and constituents. Sixty-five submissions were received from the public survey.

**July**  
CFTA leadership held a full-day strategic planning retreat and, since then, has worked actively to compile the results and produce the Campus FM Technology Association 2019-2024 Strategic Plan.

From Fall 2018-March 2019, CFTA compiled all results, re-wrote the association's Mission, Vision, and Value statements, and finalized all content. With the support of professional services, the 2019-2024 CFTA Strategic Plan was completed.

## October

- The planning process began with a non-profit consultant. The contract resulted in the following services:
- Consult and interview with President, officers or any (and all) appropriate Board members, and/or other stakeholders about the history, culture, and activities of the organization requesting areas of special concern
  - Review organizational information - mission, vision previous strategic plans and budget
  - Develop a plan with timeline, goals and guidelines for a three to six-month organizational strategic planning process
  - Conduct coaching session to orient the board and staff about elements of strategic planning, including external and internal analyses, mission, vision, values review and development, program evaluation and alignment, and providing a planning guide and schedule
  - Conduct, facilitate and oversee a half to full-day strategic planning retreat on July 30, 2018 in Columbus, Ohio
  - Coach staff on the development of action plans and budget to complete strategic plan
  - Draft strategic plan with strategic objectives and suggested metrics

## Method:

This Five-Year Strategic Plan is intended as a work in progress. While the mission, vision, values and goals should remain constant, the objectives and strategies will require periodic review and refinement.

We will track progress through regular reporting of the measures, incorporating the communications into CFTA's member updates.



# 2019-2024 Strategic Plan | Community Driven Change

## Strategic Perspective #1: How to Ensure Association Continuity

**Goal I:** Improve CFTA's management and operations structure to ensure association continuity and position for strategic growth.

**Strategic Objective A:** Develop a complete published catalog of critical CFTA operations, historical reference documents, and procedural documents that will support leadership and core operational needs.

**Strategic Objective B:** Implement critical changes to our organizational structure that will promote stable and continuous business operations.

**Strategic Objective C:** Invest in best practices to include: increasing our Director seats to level needs, promote diversity, drive Board of Director engagement, and maintain institutional memory; and implementing 2-4 standing committees that serve to analyze issues and monitor the performance of the whole organization and its responsibility, while safeguarding association history and managing changeover in leadership.

**Strategic Objective D:** Hire an Executive Director to execute the strategic objectives of the 2019 - 2024 CFTA Strategic Plan.

**Strategic Objective E:** Maintain an organizationally strong association by defining regular reporting needs and developing procedures for tracking progress that promote transparency and keep CFTA members updated on the health of association.

## Strategic Perspective #2: Need to Increase Value through Services and Strategic Partnerships

**Goal II:** Develop and implement a business model to expand CFTA resources and services that best align with association member needs.

**Strategic Objective F:** Develop a Resource Needs Assessment Plan to guide goal setting and to establish direction. The plan will be built from weighted member needs, industry trends, and CFTA's current and planned resources.

**Strategic Objective G:** Survey the CFTA community to determine desired learning topics and educational platforms, and then develop a program of potential offerings with budget and resources needed to successfully implement the plan.

**Strategic Objective H:** Partner with 1-3 affiliated organizations who share, support, and compliment CFTA's strategic goals.

**Strategic Objective I:** Determine mutually beneficial avenues for collaboration and allocate resources and an annual budget to ensure investment in long-term partnerships.

**Strategic Objective J:** Introduce new service offerings and partnership updates to members. Communicate new offerings through marketing outreach strategies while ensuring members are kept informed at the annual All Member Meeting during the annual conference.

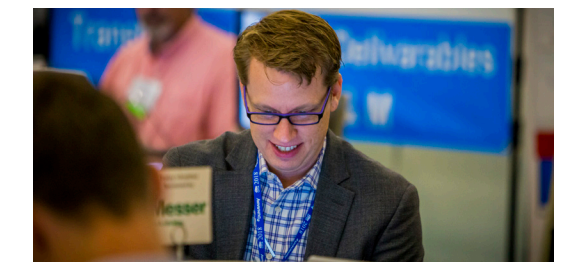
## Strategic Perspective #3: Need to Increase Financial Reserve to Support Strategic Objectives

**Goal III:** Develop new funding strategies and secure partners to increase CFTA's annual income.

**Strategic Objective K:** Develop a financial planning strategy that offers areas for mutual gain to investors and the association. We will identify potential revenue streams from service offerings and develop benefits to the cost matrix that evaluates value and ensures equity to investors.

**Strategic Objective L:** Partner with key business partners and develop strategies for mutual gain. One such way is through launching a new Sharing Technologies & Resources (STAR) Partner program for CFTA champions and sustaining partners.

**Strategic Objective M:** Launch a new financial business model via roll out of a member new costs and benefits schedule.





# 2019-2024 Strategic Plan | Community Driven Change (Cont.)

## Strategic Perspective #4: How to Enable Community Resource Sharing

### Goal IV: Develop and Launch new CFTA Shared Resources System

**Strategic Objective N:** Identify potential systems that support the long-term system goals, which include integration abilities with the existing member sign-on system.

**Strategic Objective O:** Develop a budget to account for steady growth and perceived increased costs over a 1 to 5-year growth schedule to ensure long-term success.

**Strategic Objective P:** Launch a PILOT system and develop criteria to evaluate needs in determining solution success.

**Strategic Objective Q:** Develop a document of guidelines for use, desired contributing content, and other supporting information for intent of use once the final system is identified.

**Strategic Objective R:** Implement strategic marketing campaigns that inform the public of this new resource and how to access the system to join CFTA, since success depends on contributions from our membership.

**Strategic Objective S:** Develop reports and metrics on system contributions and release reports annually to both members and the public at large.





# Empowering Change: Enablement Team

## Thank you!

CFTA Leadership would like to extend its sincere gratitude and appreciation for all of the support and dedication provided by its extensive community throughout this process and beyond. To the CFTA community for its time and effort to provide feedback; to our support team, consultants, and service providers for their dedication to excellence; and to the association members, partners, and volunteers for all contributions and ongoing support over the past 29 years. Without this combined energy, talent, and vision, the **2019-2024 Strategic Plan | Community Driven Change** would not have been made possible.



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