

**STATEMENT OF BRAND VALUES AND PURPOSE**

**&**

**2010-2012 STRATEGIC PLAN**

**For**

**THE ILLUMINATING ENGINEERING SOCIETY  
OF NORTH AMERICA**

**March 1, 2010**

Approved by the Board of Directors  
March 29, 2010

## TABLE OF CONTENTS

I. INTRODUCTION

II. BRAND VALUES

III. MISSION AND VISION STATEMENTS

IV. STRATEGIC GOALS

V. STRATEGIC INITIATIVES

VI. ONGOING PLANNING PROCESS

### **I. Introduction**

This document represents the culmination of an extensive effort begun in 2005 to review the Illuminating Engineering Society of North America's (IES) brand and to develop a four year strategic plan that would define the work to be undertaken by the IES as it continues into its second century of leadership in the lighting industry. This shared understanding will help all members, staff and future boards communicate the values of the IES at every contact point.

The 2010-2012 Strategic Plan will continue to make the IES viable in the long-term and allow for the next phase of meaningful, measurable steps in-line with the evolving interests of lighting professionals. It will guide the leadership team for the purpose of making relevant decisions and delegating tasks. It will help develop the IES leadership into both learners and sharers of current technical information, and an organization where feedback is not only encouraged, but sought from all members.

The plan identifies core goals and initiatives that will align our future activities ensuring implementation of our mission and achievement of our vision. Constant monitoring of this plan, its philosophy and initiatives are integral to making IES a dynamic advocate for quality lighting.

This document was presented to and approved by the Board of Directors by online ballot on March 29, 2010.

## **II. Brand Values**

### **A. Perceived Attributes of the Previous IES Brand**

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

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

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

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

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

### **B. Future Attributes of the Brand**

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

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

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

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

### **C. Audiences**

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

#### **Lighting Designers**

Professional Lighting Consultants

#### **Allied Professionals**

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

#### **Researchers & Educators**

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

#### **Lighting Fixture, Equipment and Lamp Designers**

Professionals involved in the design of lighting equipment

#### **Lighting Related Equipment Manufacturing Sales & Distribution**

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

#### **Contractors, Builders, Utilities & Service Companies**

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

#### **Lighting and Energy Regulators**

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

#### **End Users of Lighting Equipment**

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

#### **Students**

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

## **D. Key Messages**

- Everyone needs good lighting – “Light Matters”
- Lighting is a vital element in a healthy and productive environment and by incorporating the standards and education provided by IES, quality lighting should be the norm and not the exception
- IES recommendations will improve productivity and safety, and can positively impact the economy of an individual, company and the environment.

## **E. Organizational Values**

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

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

## **F. Assessment of Rebranding Initiative – January 2010**

The IES rebranding was accomplished by the 2006-2007 and 2007-2008 Boards of Directors and the vision and leadership of Presidents A. Lewis, K. Flynn, and K. Mercier. The IES website has been completely upgraded and all IES literature and publications now reflect the new corporate rebranding, including the new IES color scheme. Sections have been instructed upon the proper use of the IES logo and branding and there is a clear set of instructions on the website about the only authorized uses of the IES Brand. Officially, Sections are now named after their major cities or regions, which has eased the confusion of the management and support of Section activities from the New York office. New members and those interested in affiliating with their local IES Section are finding their way to obtaining information about Section activities more easily. The Society is once again becoming known as the IES, which clearly aides our visibility in the wider public eye. The branding also clearly emphasizes “ILLUMINATING”. Our members have almost unanimously been in favor of the updated look and the rebranding initiative.

## **G. The IES Board of Directors**

The IES Board consists of fourteen voting members, including the President, Vice President, Past-President, and Treasurer. There are four elected Regional Directors, one from each of the four North American Regions, and six Directors elected at-large from the nomination process and voted upon by the entire membership. Each Board member serves on two Board committees, or one committee if they chair that committee. The standing Board committees are as follows; Strategic Planning, Knowledge, Organizational Development, Culture & Heritage, and Finance. There is more information posted on the IES website at [www.ies.org](http://www.ies.org) but summarized here because several of these committees are referenced below in the Strategic Plan action plans.

### **III. Mission & Vision Statements**

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

#### **Mission Statement:**

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

#### **Vision Statement**

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

### **IV. Strategic Goals**

To carry out its mission and vision, IES will actively pursue a set of five strategic goals aligned with the elements of its mission:

#### **Goal #1:**

Develop our core competencies and constituency, and continue to broaden our reach and expand the community we serve.

#### **Goal #2:**

Promote the dynamic development of innovative lighting research and the rapid translation of discoveries to improve the quality of the lighted environment.

#### **Goal #3:**

Improve the existing committee structure and process in order to provide timely and relevant services that meet the market needs of our members and the general public.

#### **Goal #4:**

Increase the value and relevance of the IES to the lighting professional by providing effective professional development and lighting education.

#### **Goal #5:**

Position the IES as the preeminent voice and advocate for quality lighting in our communities.

### **V. Strategic Initiatives**

The strategic goals identified above represent a long term framework to provide guidance to the Board, Regions, Sections and our Committees as they develop programs and activities in the coming years. For each strategic goal, there are a series of initiatives that require further exploration, discussion and development in order to develop consensus among the membership about specific programs and changes that should be pursued.

## **Strategic Plan 2006-2010 – A Review**

Before presenting the 2010-2014 Strategic Plan, it may be helpful to review the previous four years and summarize the accomplishments and identify strategic initiatives that are ongoing or have yet to be accomplished.

Strategic Initiatives 1.01 (Create Value/Benefits to Membership), 1.02 (Diverse Membership), and 1.03 (Emerging Professionals) are all important parts of the current plan that need to be continued as initiatives over the next four years. The Emerging Professional program is established; now the Board should expect Sections to utilize this program in most of the major Sections. The previous 1.04 and 1.05 (both on Leadership Training) have been accomplished and remain an ongoing part of the Leadership Forum at the Annual Conference. These items no longer need to be included in the Strategic Plan. Previous 1.06 (New IES Staff) was completed and shall also be removed from the new Strategic Plan. Strategic Initiative 1.07 (Blue Ocean Group) was not accomplished and is of questionable worth considering the more urgent needs summarized in the current Plan: Strategic Goal V. Initiative 1.08 (Allied Organizations) will be re-numbered in the current Plan as Strategic Initiative 1.04. We have had the model of IES and ASHRAE's highly successful collaborative efforts going back to the early 1970s. The IES needs to have similar, more formalized, Board-appointed relationships with other important associations over the next four years.

Strategic Initiative 2.01 (Research Task Force) should be an ongoing effort from the Board. The IES has hosted several research summits in the past four years and this work should get more attention and resources in the current Strategic Plan, particularly as directed by the needs identified by the Board Knowledge Committee. Previous Strategic Initiative 2.02 (Promotion of Leukos) has been accomplished and is removed from the current Plan.

Strategic Initiatives 3.01 (Reshape the Committee System) and 3.02 (Committee Document Development and Delivery process) will both be dropped from the new Strategic Plan. The basic committee system is sound but may be in need of management at times: i.e., task forces established, new chairs selected, a clear project direction from Board, hiring an author or a team to fast-track a needed document, etc. New Manager of Technology will help keep committee work moving. Strategic Initiative 3.03 (Committee Chair leadership planning and goal setting) has been successful and will be an ongoing part of the Leadership Forum presented as a workshop on Sunday at the IES Annual Conference. The Strategic Initiatives related to committees have all been dropped from the current Strategic Plan.

Strategic Initiative 4.01 (Educational Activities Task Force) has been somewhat successful but there is much to be done to continue this early effort. Membership is asking for more courses and updated educational materials. Previous Initiative 4.02 (Annual Conference Task Force) has been implemented and changes to the conference have been made. 4.03 (Lighting Information Center) was not completed and it will be considered as part of the current Plan as Strategic Initiative 4.02. The IES Board has determined this to be a priority for the new plan. Strategic Initiatives 4.04 (Lighting Education Summit) and 4.05 (Major

Public Outreach for K-12 Students) were not accomplished; both initiatives are to be dropped from the Strategic Plan.

Previous Strategic Initiatives 5.01 (Branding Strategy), 5.02 (Integrated Marketing and Media Campaign to Raise Awareness of the IES), and 5.03 (Strategic Alliances with other Lighting Organizations) are all being dropped from the new Strategic Plan. The Branding Strategy, as noted earlier has been a resounding success. The current Board feels that marketing in this economic and legislative climate would be better done among our closer constituent organizations, (see Current Strategic Plan Initiative 1.05, among others, which will replace Previous Initiative 5.03). Previous Strategic Initiative 5.04 (Position IES as an Advocate for Quality Lighting), has not been accomplished but the Board will re-emphasize this initiative by splitting this vague objective into two: addressing the Public, (Strategic Initiative 5.02) and addressing elected officials, (Strategic Initiative 5.03). Previous Initiative 5.05 (Encourage Professionals to become Involved with local Civic organizations), will be an ongoing initiative in the new plan, re-numbered as Strategic Initiative 5.03.

**Current Strategic Plan:**

For each strategic goal we have identified strategic issues (*the motives for acting*), desired outcomes (*image of what will be accomplished if we are successful*), guiding principles (*setting the parameters on actions to be taken*), and finally metrics for measuring success. The strategic issues and action plans for each strategic goal are described below.

**STRATEGIC GOAL I**  
**DEVELOP OUR CORE COMPETENCIES AND CONSTITUENCY AND CONTINUE TO BROADEN OUR REACH AND EXPAND THE COMMUNITY WE SERVE.**

**Strategic Issues:**

That first and foremost, we should follow our Mission and Vision statements by first serving the needs of our members, the lighting professions, and then the public at large.

**Desired Outcomes:**

- A strong organization with an engaged and active membership. Strong Sections with healthy leadership, excellent educational programs, great Section business meetings, and overall membership satisfaction.
- Healthy renewal rate of existing members.
- New members joining because of the attractiveness of the IES and its programs.

**Guiding Principle:**

Member retention by providing value to the IES membership.

**Strategic Initiatives:**

**1.01 Create more value/benefits to increase membership.**

**Desired Outcomes:**

- Increase overall membership and membership satisfaction.
- Increase employers’ perceived value of IES Membership.
- Increase individual’s perception of the value of IES membership and their belief that it satisfies their need for personal and professional growth.
- Increase attendance and attendee ratings of the IES Annual Conference

**Guiding Principles:**

Cost sensitivities increase when perceived value is low.

**Action Plan:**

Responsible Party = R Stakeholders = all others	Action Item	Target Completion Date
Membership Committee, Region and Section Coordinator, R Regional Directors, Director Member Services	Increase membership communication from the Society to the Regions and to the individual members.	On-going
Membership Committee, Regional Directors, District Chairs, Section Membership Chairs, Region and Section Coordinator R	Improve new membership communication. District Chair to assist each section to communicate with members and to address section membership chairs.	November 2010 and ongoing
Regional Directors, R District Chairs, Section Presidents, Section Education Chairs	Promote Lighting Education throughout all Sections. When new IES course materials become available have a District Education Event to stimulate interest and train Sections	As materials are published by IES, within 60 days of release date
Region and Section Coordinator, R Membership Committee	Conduct Email or phone surveys to all members of two+ years who did not renew their memberships	Report to BOD May 2011, and annually thereafter
Regional Directors, R District Chairs, Regional and Section Coordinator, Section Membership Chairs	Implement Mentorship Program as outlined by Membership Committee in each Section. Larger Sections shall have a Mentorship Coordinator assigned by Section Board of Managers	Report to BOD annually at IES Annual Conference meeting

**Measures of Success:**

- Increase in retention rate of new members
- Key information gathered by staff to determine membership satisfaction and Board of Directors response to non-renewing memberships.
- Mentorship activities ongoing with newer members to the lighting industry and IES

**1.02 Create a diverse membership that is active, involved and committed; members who will be assets to their employers and the IES.**

**Desired Outcomes:**

Provide experiences to members that make the member more valuable to the employer. Increase member’s ability to achieve personal growth.

**Guiding Principles:**

Increasing participation by a diversity of participants will yield better offerings and publications. Learning to achieve consensus within a diverse workgroup is vital to global businesses today. The Leadership Forum Chair and Vice-Chair should be elected by the 8 District Chairs and the 4 Regional Directors.

**Action Plan:**

Responsible Party = R Stakeholders, all others	Action Item	Target Completion Date
Membership Committee, Chair, Leadership Forum, R 8 District Chairs, 4 Regional Directors	Broaden membership base by including allied groups and by including broad training including managerial skills.	Ongoing Leadership Forums offered at IES Annual Conference
Regional Directors, Leadership Forum, Chair, Leadership Forum R	Active encouragement of Sections to fund Section Officer participation at the Annual Conference. Provide financial incentives for smaller sections to send an officer.	Ongoing
Director of Member Services, R Membership Committee, Regional Directors	Provide recognition programs that showcase diversity of membership and member satisfaction.	Monthly Member Profile on IES Website, Ongoing at Annual Section Awards programs, IES Awards and published recognition

**Measures of Success:**

Increased diversity of member affiliations  
Implementation of recognition programs  
Average of one person from every section attending Leadership Forum

**1.03 Increase interaction among and attractiveness to students and younger members by developing both an Emerging Professional’s organization as well as a Mentorship Program within the IES. Provide the best Section-facing leadership possible to encourage the strongest possible sections.**

**Desired Outcomes:**

Increase participation of young professionals and students to develop a strong base for future development within the society and the industry. Establish Mentorship Program in every Section. Bi-Annual evaluations of volunteer leadership to ensure that Section officers feel connected to the IES leadership and given the resources to make their Sections as strong as possible.

**Guiding Principles:**

We are not the future of this profession, but we can ensure that there is a future for this profession.

**Action Plan:**

Responsible Party = R Stakeholders = all others	Action Item	Target Completion Date
Membership Committee, R Regional Directors, District Chairs, Section Emerging Professionals Coordinator	Implement Emerging Professionals program at each Section	December 2011
Chair, Leadership/Culture, R Regional Directors, District Chairs	Chair of Leadership Development & Cultural Heritage to implement Mentorship Program with Regional Directors.	November 2010
Membership Committee, Regional Directors, R District Chairs	Report to Board of Directors on Emerging Professionals and Mentorship programs	Annually at Regional Council and BOD Meeting at Annual Conference meetings
Chair, Organizational Development, R OD Committee, Regional Directors, District Chairs	Yearly evaluations conducted of all Section-facing leadership, both Regional and District. At a minimum, reporting, bi-annual District DEC meetings, slates and financial reporting done on time, etc.	Bi-annually before May and November Board meetings

**Measures of Success:**

Membership growth in this category and successful meetings of the group. Sections reporting satisfaction with IES leadership and the direction the Board is taking the Society.

**1.04 Position members in allied organizations.****Desired Outcomes:**

- Strengthen relationships with existing strategic partners and identify potential new organizations
- Key priorities will be with the following organizations: First priority: AIA, USGBC, ICC, BOMA, ASHRAE, and DOE. 2<sup>nd</sup> Priority: IALD, NALMCO, ALA, GSA. Mexican and Canadian organizations will be included in the future.
- Develop relationships with key members of other organizations, and make this an official Board-recognized appointment

- Increase the recognition of the IES as the preeminent voice and advocate for quality lighting in our communities
- Increased opportunities for collaboration in areas of mutual interest
- Offer to the USGBC, the AIA, and other organizations requiring CEUs, the availability of lighting education provided by the IES. If there is interest, this interest will be reported to the Director of Technology and the Knowledge Committee for their response.

**Guiding Principles:**

Establish the strategic objective for each relationship and find members that either currently belong to the organizations or would like to become actively involved with those organizations. Members should have a commitment to both the IES and the allied organization. Since the key to success will be developing long term relationships, those participating in this program should have the time and ability to be actively involved with both groups.

**Action Plan:**

Responsible Party = R Stakeholders = all others	Action Item	Target Completion Date
Organization Development Committee, OD Chair, R	Begin annual evaluation of organization outreach priorities	August 2010
President, Vice President, Chair, Organization Development, R Board of Directors	Identify/Solicit potential liaisons from among the IES membership	November 2010
Board Appointed Representative to Allied Organization	Attendance at Organization’s Annual meeting. Interaction, where possible at the Board level. Report made to IES Board of Directors	Annually
IES Organizational Liaison, Organizational Leaders	Begin annual development of goals and joint action items of IES/Organization	August 2011
IES Organizational Liaison, Regional Directors, Organizational Leaders	Identify/Solicit potential regional liaisons from among the Regional membership	August 2012
Regional Organizational Liaison, Regional Organizational Leaders	Begin annual development of goals and actions items of IES Districts & Sections and corresponding Organization groups.	January 2013

**Measures of Success:**

- Official society-organization liaisons are in place before start of 2011 IES year.
- Reported list of goals and measures taken to meet/exceed goals produced to Board annually, broken down by organization.
- Official Regional-organizational liaisons, where applicable, are in place before start of 2012 IES year.
- Increase in Section level activities, where applicable, with targeted organizations.

**STRATEGIC GOAL II**  
**PROMOTE THE DYNAMIC DEVELOPMENT OF INNOVATIVE LIGHTING**  
**RESEARCH AND THE RAPID TRANSLATION OF DISCOVERIES TO IMPROVE THE**  
**QUALITY OF THE LIGHTED ENVIRONMENT**

**Strategic Issues:**

- Our ability to develop new technical documents in a timely fashion.
- Our inability to do expeditious and complete research.
- Our ability to analyze and address technology and industry issues.
- Our ability to help secure and provide funding to perform necessary research.
- Our society is not geared toward conducting research.
- Need for basic lighting research.

**Desired Outcomes:**

Factual research to aid policy makers and the establishment of the IES as the key authority to impact quality lighting decisions in a responsible manner.

**Guiding Principle:**

Quick to market with well-vetted, consensus documents for public use and to reduce the frequency of poorly conceived decisions from less well-informed authorities

**Strategic Initiatives:**

**2.01 Establish a Research Task Force to draft a blueprint document for developing a research initiative. The blueprint will address the following issues:**

- **Funding options and expected potential endowment size.**
- **Methods for soliciting and selecting research.**
- **Methods for awarding research work to qualified organizations from academia, lighting research organizations or private industry.**

**Desire d Outcomes:**

- Implementation of a research funding program.
- Implementation of process for soliciting and selecting research to be funded by the society specific to our committee needs, society needs or industry needs.
- Develop and implement a method of awarding research work to qualified organizations from academia, research organizations or private industry.
- Incorporate funded research into our technical documents and publish results in Leukos.
- Promote Leukos as the lighting research journal to other organizations that can benefit from the research completed.

**Guiding Principles:**

Promotion of lighting research should be a core value of the IES in order to meet the strategic vision of creating the premier lighting community dedicated to promoting the art and science of lighting.

**Action Plan:**

Responsible Party = R Stakeholders = all others	Action Item	Target Completion Date
Research Task Force, Chair, Knowledge Committee, R Knowledge Committee Research Committee	Report to Board of Directors on the state of lighting research in North America, based upon the EPRI Report and other input.	May 2010
Chair, Knowledge Committee, R Knowledge Committee Research Committee, Past-President	Create lighting research round table with invited guests from other allied organizations	Bi-Annually starting in 2011, to continue the cycle of events held in St Louis, 2007 and Washington DC in 2009

**2.02 Charge the Board Knowledge Committee with preparing a bi-yearly report to the Board of Directors with an updated document matrix, ongoing work in developing and updating documents, and providing a Gap Analysis of research and technical subjects needed by the public and the lighting community at large. This report will be presented at LIGHTFAIR and the IES Annual Conference Board of Directors meetings unless an alternative meeting is selected.**

**Action Plan:**

Responsible Party = R Stakeholders = all others	Action Item	Target Completion Date
President, Director of Technology, Vice President, Chair of Knowledge Committee, R	Strategic Knowledge Plan meeting. Priorities for the IES for the coming year in terms of: Knowledge, Education, Research.	May 2010. Knowledge Plan to be updated annually and an assessment made on achievement of annual goals.
Chair of Knowledge Committee, R Knowledge Committee, Director of Technology, Manager of Technology	Committee meeting to evaluate gaps and assign members to each topic	August 2010
Chair of Knowledge Committee	Present reports to BOD with biennial updates	November 2010, May 2011

**Measures of Success:**

- Preliminary report developed with Gap Analysis
- Report made to Board of Directors at next Board meeting
- Email updates to Director of Technology and Manager of Technology as often as needed
- Board engaged in the process and action plans generated when urgency requires it
- RFPs and author's remuneration shall be negotiated by the Director of Technology, with Board approval for any allocated expenditures
- Manager of Technology shall be responsible for maintaining the Document Matrix which shall be continuously updated.

**STRATEGIC GOAL III**  
**IMPROVE THE EXISTING COMMITTEE STRUCTURE AND PROCESS IN ORDER  
TO PROVIDE TIMELY AND RELEVANT SERVICES THAT MEET THE MARKET  
NEEDS OF OUR MEMBERS AND THE GENERAL PUBLIC**

**Strategic Issues:**

The current committee structure and processes are working quite well. At times, certain committees do not provide timely and relevant services that meet the needs of our members and the general public, but in recent years, proactive management by the Board and particularly by the Director of Technology have made the necessary changes to keep the committee document writing process flowing and have maintained our ANSI accreditation. There is a need for ongoing leadership training for committee chairs. The current reporting structure of the committees to the Board needs to be managed by the Manager of Technology.

**Desired Outcomes:**

The Strategic Initiatives dealing with committees have been removed from this Strategic Plan as they are no longer priorities with the additional staff hired during the last Plan. The Board of Directors will seek to have timely updates on committee activity and make changes to committee leadership and direction as necessary.

**Guiding Principles:**

Ensure that responsive and efficient procedures govern the IES committee process to insure that the work of those committees is responsive to societal and market needs.

**STRATEGIC GOAL IV**  
**INCREASE THE VALUE AND RELEVANCE OF THE IESNA TO THE LIGHTING PROFESSIONAL BY PROVIDING EFFECTIVE PROFESSIONAL DEVELOPMENT AND LIGHTING EDUCATION**

**Strategic Issues:**

The IES membership continues to demand educational offerings of the IES that are fresh, timely, and of an authoritative nature for the Sections to present to their membership. AS a primary objective, IES educational programs must be able to reach all experience levels of the lighting professions, before creating programs that address the needs of the general public and students.

**Desired Outcomes:**

The goal of this strategic effort is to develop a comprehensive educational offering from the IES which will address the needs of the lighting industry. This offering will include: seminars, courses, conferences, and outreach activities. These offerings must encompass all levels of educational needs from basic to advanced with additional opportunities for lifelong learning.

**Guiding Principle:**

Provide the best educational opportunities to the lighting industry to meet the needs of lighting professionals, allied professionals, students and the general public. Courses and updated material should be made available to the membership in the quickest method possible with vetting and educational review done in an equally expeditious fashion.

**Strategic Initiatives:**

**4.01 Establish a task force to develop a multi-year action plan for increasing and improving IES sponsored Educational Activities in response to the needs of members, allied professionals and the general public.**

**Action Plan:**

Responsible Party = R Stakeholders = all others	Action Item	Target Completion Date
Chair Organizational Dev., Vice President, 3 Invited members of ERC, Manager of Technology, R Director of Technology, Chair, Knowledge Committee	Convene Task Force, including three members of the Education Research Council or others involved with IES lighting education at the Section level.	November 2010
Chair Organizational Dev., Vice President, 3 Invited members of ERC, Director of Technology, Manager of Technology, R Chair, Knowledge Committee	Define existing course needs and potential authors	May 2011

Chair, Knowledge Committee, Manager of Technology, R Board of Directors	Evaluate gaps in Educational Offerings and charge Application and Technical Committees to prepare course Seminars on their areas of expertise.	Ongoing. As many documents become updated, next step could be an educational module or seminar with PowerPoint and other resources needed for stand alone course.
Task Force	Report to Board of Directors	July 2011
Board of Directors Manager of Technology, R Director of Technology	Authors approached and RFPs issued as needed	On going. As developed.

**Measure of Success:**

Development Cycle is identified and plan for executing the development of the documents is in place. Note: some of the Education Task Force should be members of the Educational Review Council (ERC).

**4.02 Explore the development/feasibility of a virtual Lighting Information Center that would provide accessible, up-to-date lighting information to the general public.**

**Action Plan:**

Responsible Party = R Stakeholders = all others	Action Item	Target Completion Date
Knowledge Committee, Organizational Development Committee, New Media Chair, R	Meet to develop concept and specific topics that LIC needs to address to the North America public	January 2011
Executive Vice President, Manager, Internet Services New Media Chair, R	Obtain quotes to develop new website for Lighting Information Center	July 2011
Leukos Editor, R Chair, Organizational Development, Director of Technology	Develop a list of authors who can be available for articles on lighting topics on an 'as needed' basis.	July 2010
Board Committees, New Media Chair, R	Write position pieces and short technical papers for interested viewers	On going through out 2011 and 2012
Board of Directors	Vote on content submissions to LIC Website	On going as material becomes available from the authors
Knowledge Committee	Evaluate successes and conduct periodic web searches.	On going, at least quarterly.

**Measures of Success:**

First measurement will be surveying of our members, including a survey of Sections who are crying out for more of an IES voice that they can either quote or refer their constituents to. Ultimate measurement of success will be the use of the membership and the public of the Lighting Information Center. There will be an assignment of an IES Director to be New Media Chair.

**STRATEGIC GOAL V**  
**POSITION THE IESNA AS THE PREEMINENT VOICE AND ADVOCATE FOR**  
**QUALITY LIGHTING IN OUR COMMUNITIES**

**Strategic Issue:**

To leverage our brand and create a public relations program that will heighten the awareness of IES within the communities it serves. A new staff position, reporting to the Executive Vice President, is the Director of Public Policy. Key duties and responsibilities of the new Director include:

- Plan, develop and coordinate the North American public policy interests of the IES.
- Work with the staff, the IES Board of Directors, and other appropriate individuals and committees to identify and establish priorities.
- Develop a current situation analysis of North American energy policies and their impact upon the lighting industry.
- Advise membership and leadership of the IES on pending legislative and final regulatory actions at the federal and state levels through articles, reports, oral briefings and on policy initiatives.
- Represent the IES as appropriate at industry events and conferences and identify opportunities for collaboration with other organizations on issues of mutual interest.
- Be cognizant of appropriate North American issues as well as, in general, international issues.

**Desired Outcomes:**

Universal awareness of the IES brand and greater understanding by the public of what the IES represents to all levels of society

- The lighting community in North America will begin to use IES position statements and published documents to reply to local questions related to lighting.
- Build a larger audience for lighting issues
- Become the authority on issues related to the lighted environment
- Become more visible to the public

**Guiding Principle:**

Enhance the perceived value of quality lighting

Promote collaborative relationships between IES and other lighting organizations

**Strategic Initiatives:**

**5.01 Position IES as an advocate for quality lighting among the public**

- Audience – the public, including students as well as the general consumer. All ages of consumers need to be able to access basic IES information. Many users will require more technical and detailed types of information. Both need to be addressed
- Information will be offered at no charge.

- Web presence
  - Key topics on the IES site
  - Storyboards of key topics and how they are handled with existing IES webpage
  - Search engines,
  - Related blog or interactive sites
  - Assigned people to review sites
- Define the key topics for which the IES needs to be highly visible. Topics identified include: lamp disposal, energy comparisons, safety, health, and applications. Priorities to be established by the Knowledge Committee.

**Action Plan:**

Responsible Party = R Stakeholders = all others	Action Item	Target Completion Date
IES Past President, R Executive Vice President, Editor LD+A, Director, Public Policy, Marketing Manager. Director (Invited), 2 other appointed IES Directors	Brainstorming meeting held in New York to complete marketing and outreach charter and to develop outreach topics and methods of distribution	August 2010
IES Past President, R Executive Vice President, Editor LD+A, Director, Public Policy, Marketing Manager, Director (Invited), 2 other appointed IES Directors	Committee conference calls to divide up the tasks and explore individual assignments. Specific target markets and media evaluated, i.e. advertising, blogs, Wikipedia authors, official IES responses to various internet user groups, etc.	October 2010
IES Past President	Report to the Board	November 2010
Outreach Committee	Discussion and implementation of specific outreach efforts	November 2010
Outreach Committee	Report to Board of Directors	January 2011

**Measures of Success:**

- Committee selected and meeting held in New York IES offices.
- Game plan generated through brainstorming process
- Individual assignments made
- Consultation of media professionals
- Report made to Board of Directors at next Board meeting
- Ongoing teleconferences with the committee
- Ongoing outreach efforts implemented and monitored

## 5.02 Position IES as an advocate for quality lighting among Governmental entities

### Action Plan:

Responsible Party = R Stakeholders = all others	Action Item	Target Completion Date
Knowledge Committee, Director, Public Policy, R	Knowledge Committee to review options for achieving this initiative. Look at creating experts database, a public policy council and /or foundation	May 2010
Knowledge Committee, Director, Public Policy, R	Prepare report to the Board	August 2010
IES Board	Review report and decide on next steps	November 2010
Knowledge Committee Director, Public Policy, R	Assign tasks based on report and begin implementing	November 2010

### Measures of Success:

IES will be the recognized authority on issues related to the lighted environment and a provider of information via Position Statements, White Papers and other tangible offerings made available to congressional, state, local legislative and government officials.

## 5.03 Encourage individual lighting professionals to participate in civic, educational, community, and governmental activities and projects including boards and commissions.

### Action Plan:

Responsible Party = R Stakeholders = all others	Action Item	Target Completion Date
Vice President, R Chair Membership Committee	Establish Joint Working Group from the Membership Committee and Regional Directors	August 2010
Working Group	Define Program	December 2010
Working Group	Develop Program	May 2011
Regional Directors, R District Chairs	Promote Plan at Regional & Section Level	August 2011
Membership Committee	Monitor Plan on a yearly basis and make recommendations for improvements in conjunction with the Regional Directors	On-going

### Measures of Success:

IES members and sections more consistently include and embrace public communication outreach and education about lighting. Working Group will prepare a "Fact Sheet" which Section members may use when desiring to respond to local authorities and jurisdictions. The desire here is not to encourage IES members to proactively 'lobby' their elected officials but to offer an 'informed opinion' with the guidance from the Director of Public Policy as the need arises in their local jurisdiction.

#### 5.04 Establish a Think Tank to provide guidance for the IES Board of Directors.

##### Guiding Principle:

That a rotating Board committee be established comprised of IES President, Past President, Vice President, and six additional individuals with vision and a variety of professions including technology/manufacturing, education, government, science and health, and IES Regional and Section experience. This committee would be required to meet annually for a minimum of three hours prior to the August Board workshop and Board of Directors meeting. This committee would be chaired by the IES president and a secretary would be appointed to complete a report that will be presented to the Board at the November meeting.

##### Action Plan:

Responsible Party = R Stakeholders = all others	Action Item	Target Completion Date
Board of Directors	Establish makeup of Committee	August 2010
Vice President, Past President, R Director of Technology	Identify /Solicit Potential Members	August 2010
IES Board	Board Approval	September 2010
President	Conduct first meeting	November 2010
Strategic Planning Committee	Monitor Plan on a yearly basis and make recommendations for improvements / modifications in the Strategic Plan	On-going, with report to BOD at February or May Board meeting

##### Measures of Success:

- Group identified, meeting held prior to 2010 IES Annual Conference
- Report made to Board at first meeting following the Annual Conference.
- Subsequent meetings held annually in August or alternative date.

#### VI. Ongoing Planning Process

The IES is committed to making a continuous effort to broaden and deepen the involvement of the IES member and committees in the strategic development and implementation process. The Board plans on reviewing the plan on a quarterly basis and informing the membership of progress being made on items. The Board will review the Strategic Plan on an annual basis and update the strategic initiatives as required. A comprehensive reassessment of the Strategic Plan's underlying assumptions, strategic vision, goals and initiatives will be done every four years.