



USGBC South Florida
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US Green Building Council South Florida Chapter Strategic Plan -- 2009-2013

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The South Florida Chapter of the USGBC is pleased to present this working document outlining our strategic direction for the next five years. The Chapter's volunteer leadership feels this roadmap will effectively allow the organization to achieve the identified outcomes, while still allowing the leadership the flexibility to adapt to ever-changing economic, environmental, political, social, technological and legal factors. The plan focuses on allocating the Chapter's key resources -- people and capital -- to pursue the outlined strategies, and markedly embraces what is seen as the South Florida Chapter's objectives.

Vision

To support buildings and communities that will regenerate and sustain the health and vitality of the local South Florida region within a generation.

Mission

To transform the way buildings and communities are designed, built and operated, enabling an environmentally and socially responsible, healthy and prosperous environment that improves the quality of life for the South Florida community.

Goals

1. To inspire consumers, designers, builders, developers and regulators to understand, appreciate, practice and support green building through educational programs and case studies.
2. To educate the public, local governments, and design and construction professionals regarding sustainable design, sustainable materials, sustainable construction methods, and the environmental and economic benefits of green building.
3. To encourage and support individuals who and organizations that provide education about green building in the region and beyond.
4. To become the recognized leader, through green-building education, outreach, and the sharing of best practices, in achieving the broad goal of creating a sustainable built environment in South Florida within a generation.

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Geographic Domain

The domain of the Chapter encompasses the following eight Counties in Florida -- Monroe, Miami-Dade, Broward, Palm Beach, Martin, St Lucie, Okeechobee and Indian River. The Chapter is organized around a Branch structure. The current recognized Branches are Miami-Dade and the Keys, Broward, and Treasure Coast and Palm Beach.

Governance

The Board of the US Green Building Council South Florida Chapter (USGBCSF) has successfully experienced a transformation from a grassroots group of volunteers to a governance and policy Board. In 2008, the Board determined that the volunteer-based administrative structure that had served the organization since its infancy would be insufficient to grow the organization, precipitating the hiring of an Executive Director in a full-time capacity.

Executive Summary

The USGBC South Florida Chapter serves its members within approximately 350 miles on the southeast portion of the Sunshine State, stretching from the Treasure Coast down through the Florida Keys. The South Florida Chapter was formed in October 2004 and was incorporated as a 501(c)(3) nonprofit organization in June 2007

With the extensive development of our Chapter's region, the need for building practices that mitigate the affects of expansion and development on the livability of communities and their ecosystems is more critical than ever. Buildings are a powerful leverage point for improving the environment because they account for 30% of the total energy, 40 percent of materials consumption, and 12 percent of potable water use in the United States. The USGBCSF is at the forefront of transforming the regional marketplace to support green building practices -- a proven method of reducing the impact of buildings on people and the planet, while improving economic value for building owners.

In its first five years, the USGBCSF made strides in transforming the marketplace -- initially through its grassroots efforts and later through furthering relationships with strategic public and private partnerships. Though still very much in its infancy from an association standpoint, the Chapter is already recognized as a key "go to" organization for green building in the region. The USGBCSF enjoys participation from diverse sectors of the building industry including nonprofit, environmental and advocacy organizations; state, local and federal governments; public and private utilities; universities and colleges; K-12 schools; real estate firms; finance and insurance institutions; building owners and managers; corporations; professional firms; manufacturers; and contractors.

In the next-five years, the USGBCSF will focus on: 1) further refining the organizational policies needed for effective governance; 2) presenting high-quality educational programs; 3) funding and marketing of our mission to achieve membership growth and community outreach; 4) developing a policy- and vision-oriented governance Board complemented by

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A strong staff presence; and 5) leveraging our resources through collaborations internally among Branches and externally with other Chapters within our Region, along with other organizations and businesses. Without question, the Chapter will continue to be the leader in the green-building movement in South Florida.

Finally, the USGBCSF embraces its role as a Chapter of the USGBC, and is committed to supporting our National organization's strategic plan by aligning goals and initiatives that will link our organization on a local level. The Chapter believes that it can continue to play a leadership role in helping support national policy, just as it has from the very beginning. At the same time, the USGBCSF is an independent entity with responsibility to its constituents and the general public, and will set its own course in furthering green-building initiatives in our Chapter area.

The relationship dynamics that typically occur between a national umbrella organization (such as the USGBC), and its three dispersed Chapters will mirror the relationship between the USGBCSF and its Branches. The overarching goal in managing this relationship is to maintain a sense of cohesion and avoid the perception of "us" versus "them." It is essential that stakeholders see the USGBCSF as one organization rather than four separate entities under a common umbrella.

A key role for USGBCSF is to act as a facilitator and a convener. Indeed, the job of transforming the marketplace is simply too large to accomplish for one comparatively small and still relatively new nonprofit organization, even with the structure and influence of the parent organization behind the Chapter. Hence, the USGBCSF values strategic partnerships and collaborative efforts in all of its work, and will strive to foster such alliances whenever possible.

Lastly, in all of its efforts, the Chapter will proudly hold fast and firm to the seven guiding principles set forth by the USGBC:

- Promote the Triple Bottom Line
- Establish Leadership
- Reconcile Humanity with Nature
- Maintain Integrity
- Ensure Inclusiveness
- Exhibit Transparency
- Foster Social Equity

These guidelines will continue to provide us with clarity and continuity while also giving us the flexibility to grow and respond to a rapidly changing market.

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Key Opportunities and Challenges

The following opportunities and challenges are intended to put the USGBCSF's strategic goals and objectives into context. They are not ranked in order of importance.

Opportunities and Strengths

- LEED has been established as the premier third-party rating system for green building. This preeminence gives the Chapter an important market advantage.
- Within the Chapter's region, government entities have been supportive of green building in general and LEED in particular.
- The USGBCSF Board is comprised of individuals with diverse ethnic backgrounds and from multiple industry sectors, bringing a balanced perspective to issues.
- The Chapter has a deeply committed staff of one with experience in nonprofit administration, programs, marketing, fundraising and administration.
- Opportunities exist for the Chapter to provide services and resources to support the local community and gain membership beyond its existing territory. Partnering with like-minded organizations will further our outreach.
- The South Florida market is becoming increasingly aware of green building as a best practice. Our Branch structure allows for a broadened outreach to the masses.
- There are a great many new initiatives and strategies being put forth via National and via other groups and organizations that would allow the USGBCSF to further expand its outreach. For the first year-plus of this strategic plan, the Federal government's new stimulus package particularly opens the door for some of these opportunities (e.g., CRE -- targeting real estate and developers; structuring government initiatives to follow LEED standards).
- The Chapter's strategic position with the Latin American global markets is virtually untapped.
- The Chapter's successful development and implementation of our Branch structure provides a "roadmap to success" that is being shared with other Chapters in the Florida-Caribbean Region and beyond. To this end, we've begun a collaborative resource sharing partnership with not only our Regional group, but also with National via the Extranet and direct communication to further reconfirm our internal structure and improvements that reflect our success.
- The Chapter is also blessed with a history of successful development of our programs and educational-event "evolution". We can share our expertise and knowledge base (e.g., in formulating actual task forces and sharing results) with others throughout the region and the broader USGBC Chapter community.

Weakness and Risks

- For some, LEED is perceived as overly prescriptive, costly, limiting, elitist, and not appropriate for low-income development, especially if it does not evolve to address regional or specific market segment needs.
- The green-building movement requires local data and adequate analysis of post-occupancy impacts of green buildings. Without a rigorous commitment to "proving" the benefits of green building on a regional basis, the movement risks setbacks.
- The USGBCSF needs to seek new audiences such as the financial sector and further involvement with the Real Estate market and other "enablers" of green building.

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- The Chapter's geographic reach -- from the Treasure Coast to the Florida Keys -- presents challenges in communication, networking, cultivating volunteers, donors and structure.
- The Chapter must be aware of the limitations of its volunteer base. There are only so many hours and tasks that can be thrust on a volunteer. It's far better to succeed on a reasonable number of initiatives than to disappoint various constituencies (including the volunteers) by continually falling short of expectations. Currently, it could be argued that there are not enough "quality" volunteers to carry out the many initiatives that our leadership would like to embrace.
- New third-party rating systems are emerging, particularly in the residential sector, and further engagement and partnering is necessary.
- In light of the continuously evolving nature of the LEED rating systems, there is the need to more clearly strategize the Chapter's educational platform. Because LEED is a product and can be made to be profitable, the Chapter finds itself caught between USGBC National, which has the rights to sell LEED as a product, and the non-USGBC associated organizations, which have no commitment to LEED's development, legacy, technical quality or mission. The Chapter is the salesman for National's products (LEED), and the market has, theoretically, a many alternative choices.
- The Chapter must significantly increase its base of funding to be able to sustain its growth and meet its expansion goals. It must create a more diverse and sustainable mix of both earned and contributed income, especially so as to cope with severe downturns in the economy. Otherwise, desired initiatives will not be able to fully set in motion.
- The USGBCSF has been at the forefront on many local and national issues, which at times has been difficult. The Chapter is a standalone 501(c)(3), but also a Chapter of a national organization. It struggles with issues of control and autonomy, dependence and independence.
- The Chapter structure is not currently set up for leadership development, which creates a problem in finding those who will carry the torch in the future.
- Supply and demand has brought many "education providers" into the South Florida market, which could not only impact how LEED 2009 is received locally, but also reduces the revenue stream for the Chapter.
- Perhaps our greatest Achilles' heel is the Agreement signed for the IRS when the Chapter applied for its tax-exempt status. The interpretation by the IRS has created handicaps and limitations to our organization, severely affecting our ability to respond to our membership and community needs, as well as adversely affecting our ability to optimally market our services and Chapter. We must correct this issue for the Chapter to continue its growth.

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Strategic Goals and Metrics

The USGBCSF offers a broad range of education programs, events and resources to increase knowledge, expand practice, and maximize success in the green-building industry. A strong partnership and close coordination between the Chapter and its Branches, members and parent organization (the USGBC) is essential to fulfilling the Chapter's Vision and Mission. It is through green-building education, outreach, and the sharing of best practices that our Chapter will become a leader in achieving the broad goal of creating a sustainable built environment here in South Florida within a generation. With Chapter success will come an increased understanding and knowledge on the part of our various constituencies that will translate into market demand.

For the period of 2009-13, the Chapter's Board of Directors will intertwine six focus areas with four National Strategic Targets. A solid alliance between the USGBC and the South Florida Chapter, plus a strong collaboration with the Florida/Caribbean Region, will be essential to fulfilling the Chapter's mission through its education agenda. For this reason, the Chapter's volunteer leadership has identified four target areas in which to focus our activities. Our targets are:

- Cities and Communities
- Green Building Marketplace
- Public Policy
- Organizational Excellence

Our focus areas are:

- Educational Development
- Government Relations Development
- Community Relations Development
- Chapter Development
- Leadership Development
- Media Relations Development

Logically, several priority goals relate to multiple focus areas for the Chapter.

Focus Area -- Educational Development **(inclusive of Cities and Communities)**

Goals:

- Lead the building sector's active participation in the movement to achieve sustainable cities and communities.
- Increase awareness of LEED for Schools program and projects.
- Increase awareness of LEED for Homes program and projects.
- Increase awareness of LEED for Neighborhood Development projects.

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- Increase number of educational workshops, courses and seminars offered through Chapter to meet demand.
- Support social-equity initiatives by supporting joint ventures in LEED for Schools and LEED for Homes in low-income areas of the community.
- Increase the alignment with Regional advocacy efforts in supporting change in local government mandates and incentives.
- Provide information and education to local municipalities to help them develop initiatives to further reduce their carbon footprint in order to meet the goals developed by the US Conference of Mayors.
- Facilitate educational initiatives to reach those with lower income who would benefit the most from-green building energy saving strategies.

Metrics:

- Focus most educational programs on LEED.
- Provide an average of one LEED workshop per month per calendar year. Spread workshop "opportunities" throughout geographic area of Chapter to allow hosting by each of the Branches.
- Set up LEED study sessions to occur one per quarter.
- Provide at least two LEED for Schools presentations or symposiums per year (to be included in low-income areas).
- Provide at least two LEED for Homes presentations or symposiums per year (to be included in low-income areas).
- Develop and distribute an outline of benefits of utilizing the LEED rating to developers, building owners, and government agencies to further promote green building initiatives.
- Strengthen relationship with Green Advantage. Increase number of training seminars to the construction trades.
- Develop a "toolkit" that will help guide local partners. Offer educational programs to attract local municipalities and other government groups to attend presentations.
- Increase the number of presentations given to local groups, associations and conferences addressing sustainable initiatives.
- Partner with two or three of the professional organizations in efforts to deliver educational and/or advocacy efforts -- AIA, BOMA, CASF, FGBC, APA. Partner with at least three other nonprofit organizations in supporting social-equity initiatives for green-market transformation (e.g., Architecture for Humanity, Habitat for Humanity, Rescue Earth).
- Offer introductory "LEED 101" classes to the non-technical general public and other groups. Offer mid-level training workshops for "Learning to LEED". Develop a PowerPoint presentation that can "travel" for use by Chapter leadership for presentation to any group, such that it can be given by anyone inclusive of our Branch Governing Council members. Besides basic introductory material, emphasize LEED for Schools and LEED for Homes initiatives.
- Provide presentations on residential initiatives (i.e., a REGREEN program).

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Focus Area -- Government Relations Development **(inclusive of Public Policy)**

Goals:

- Lead the building sector's active participation in the efforts of local government to achieve sustainable cities and communities.
- Recognizing that green-building strategies, including energy efficiency, are a cornerstone of the plan to revitalize our economy, support and educate federal, state, county and city elected officials, and assist governments, with efforts to jump-start green-building initiatives, create green jobs, and save energy and money.
- Participate in regional economic development planning groups to ensure that green building objectives are included in economic strategies and in providing opportunities for green jobs.

Metrics:

- Participate in a leadership capacity in the annual Florida Legislative Day in Tallahassee.
- Participate in a leadership capacity in all advocacy-related calls and webinars offered by National.
- Create and disseminate information on "best practices" to at least 10 smaller municipalities spread throughout the three Branch areas to help the municipalities assess sustainable initiatives that will be easy to embrace (e.g., forming a volunteer "Green Team", finding a local mentor to help guide in implementing a green plan or action, create a simple template that can be utilized).
- Create and disseminate local LEED ordinances information to share within our Chapter's area; each Branch to achieve a minimum of five such distributions.
- Create a toolkit to help further green initiatives by local municipalities.

Focus Area -- Community Development **(inclusive of Cities and Communities, Green Building Marketplace)**

Goals:

- Lead the building sector's active participation in the movement to achieve sustainable cities and communities.
- Fully integrate social equity into our Chapter's efforts on all levels, and consult with diverse communities, including the underserved and underprivileged communities, and be proactive in advancing social equity objectives. Collaborate with social justice and quality-of-life advocates and their organizations, in order to integrate the theories and practices of social and economic justice with those of sustainable building.
- With the built environment as a focal point, improve the health and wellbeing of humans and all life through creative engagement.
Promote the triple bottom line -- environmental responsibility, economic prosperity and social equity -- by establishing leadership and sound practices that will champion societal models.

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- Increase effective strategic alliances and strengthen communication channels with other organizations and groups (local, regional, statewide).
- Increase the level of participation of each regional National member-organization in the Chapter.
- Strengthen and enhance Chapter/National partnership in local projects.

Metrics:

- Collaborate with municipalities in promoting redevelopment and more urban-focused areas.
- Reach out to non-professional groups (e.g., HOAs, PTAs and other similar organizations) in the South Florida area and provide information concerning the health benefits of green buildings.
- Reach out to other green organizations or industry partners and develop collaborative efforts in the form of educational programs.
- Increase awareness of green affordable housing.
- Create and coordinate a speakers' bureau and be proactive in having participants "present" in public forums such as those hosted by libraries and civic organizations.
- Pursue grants and partnerships and other funding means to support bringing green initiatives to lower-income families.

Focus Area -- Chapter Development
(inclusive of Organizational Excellence, Green Building Marketplace)

Goals:

- Increase Chapter membership numbers through strategies tied to recruitment, retention and reclamation of expired memberships.
- Increase and diversify sources of contributed income. Grow number of participants in the Chapter's Donor Circle Program.
- Develop the Chapter brand and align it with the organization's business strategy. Make our brand a catalyst to our business goals, creating value such that the general public, governments, business community and media view the USGBC South Florida Chapter as a viable, important, value-added nonprofit organization and resource.
- Further our educational efforts in the Latin/Caribbean marketplace. Develop strategies to reach the large Hispanic market here in our Chapter's region.

Metrics:

- Continue to coordinate educational programs in order to share in net income.
- Facilitate compilation and publication of statistics of local LEED projects. Prepare collection of pictures and/or slides of local projects to document the growth of green building in the South Florida area.
- Develop and promote "classes" (e.g., CEUs, study sessions) with content which USGBCSF will "own," and from which it will retain 100% of net income.
- Identify and develop other income-generating ideas, such as publishing LEED learning tools and resource directories.

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- Develop and implement a plan for year-round solicitation of grants from both regional and national foundations.
- Increase Board support for Chapter's fund-raising efforts through personal giving in accordance with means (to both annual funds and capital drives) and hands-on solicitation of others.
- Solicit corporate sponsorship and in-kind contributions for USGBCSF events.
- Conduct a comprehensive member-satisfaction survey each year, such questionnaire giving members a chance to voice their concerns, make recommendations and sing praises related to the Chapter, the USGBC and the industry. Such open and confidential communication with our members will secure much valuable data, enabling the Chapter to refocus strategies to serve our most valuable constituency.
- Achieve a minimum 20% membership growth from year to year.
- Achieve a minimum 75% membership retention from year to year.
- Reconnect with former members with an invitation to rejoin the Chapter.
- Generate Annual Report and post it on the website.
- Create an annual recognition event for honoring the South Florida green community's leaders and projects (perhaps with ties to Gala Verde).
- Schedule meetings with media teams of all nonprofits in the South Florida community (i.e. chambers of commerce, economic development organizations, professional organizations).

Focus Area -- Leadership Development **(inclusive of Organizational Excellence)**

Goals:

- Identify and nurture future leaders of the organization. Seek passionate, high-ethics individuals who are able to be fully engaged as volunteers from the standpoint of contributions of time, expertise and community/industry connections, who also demonstrate a propensity to get along with people and put self-interests aside.
- Identify what skills, connections or resources are needed from the Board and create a recruiting plan to fill available positions to fill these needs. Facilitate a bottoms-up approach to developing new leaders.
- Promote the triple bottom line -- environmental responsibility, economic prosperity and social equity -- by establishing leadership and sound practices that will champion societal models and improve relationships with other organizations.
- Increase operational and organizational effectiveness through clearly defined roles, responsibilities and priorities across the Chapter.
- Assure a diverse representation of the Chapter's membership on the Board through "best effort" adherence to National's "Member Categories" guidelines for Board make-up.
- Assure Branch Governing Council leadership at each Branch is fully functioning.
- Examine committee structure to assure "need" versus "tradition". Create new standing committees as needed; eliminate those that are no longer necessary for the Chapter/Branch structure to move proactively forward.
- Assess role of Advisory Council (e.g., consider inclusion of individuals from the business community to provide guidance on various industry-related issues).

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Metrics:

- Conduct semi-annual "leadership" meetings between Branch Chairs and Executive Committee where strengths and weaknesses of Branches and Chapter are discussed.
- Provide face-to-face Dynamic Governance training (on an annual basis) for new members of the Board of Directors and Branch Governing Council.

Focus Area -- Media Relations Development
(inclusive of Community Development, Organizational Excellence)

Goals:

- Become the resource for the South Florida media -- print and broadcast -- for all matters tied to sustainability and "green" stories (feature or news), particularly with regard to the built environment. By extension, Chapter/Branch spokespeople will also represent the Chapter and the USGBC to the national and international media.
- Have the Chapter's website be a single-source for green-related statistics and stories (e.g., develop and maintain a database that tracks the impact of building on the environment and the mitigating effect of green building practices).

Metrics:

- Train the Chapter's volunteer leadership in "USGBC messaging" so as to develop media-ready representatives to speak for the USGBC to the media.
- Create and maintain top-shelf media list -- print and broadcast.
- Disseminate at least two news releases per month regarding a wide range of Chapter successes, programs and events that reflect the synergy of the Chapter and its value to the South Florida community. Include announcements related to and successes of Board members and other Chapter leadership.
- Distribute (via news release) on an annual basis specific market data relevant to LEED and sustainable design and the construction industry -- for the Florida/Caribbean Region and South Florida, specifically, but also as it relates to global markets.
- Develop and distribute a series of public-service announcements (PSAs) for broadcast on radio and/or television intended to modify public attitudes by raising awareness about the importance of adopting an ecological and sustainable approach to living in South Florida.
- Enhance the media section on the Chapter website by reflecting the aforementioned news releases and by bulking up statistics tied to LEED, sustainability and the built environment.
- Generate annually four Board-member written op/ed pieces for local media tied to newsworthy "happenings" in specific municipalities (e.g. LEED for Schools, Broward 2030, LEED for Homes, CRE initiatives, etc.).
- Generate and make available to Branches a complete set of graphics/branding elements for use in visual materials, stationery, boards, booths, etc. (i.e.: logos and standards for typefaces). Also, provide a summary set of "branding guidelines" for the Branches to adhere to (e.g., Chapter logos, typeface preference, and as National's logo guidelines).

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