

Associated General Contractors of Washington Education Foundation 2015-2020 Strategic Plan

FINAL REPORT | The Implementation Plan

September 22, 2015

Focus Question

“What are the necessary deliverables over the next five years as AGCEF implements the Macro Strategies?”

Agenda

Welcome & Introductions	Diane Kocer
Overview of the Day's Work Plan	Dave Cunningham
Small Group Assignments	Dave Cunningham
Workshop I: Documenting the Five-Year Implementation Plan	Groups
Small Group Reports	Group Leaders
Wrap-Up & Next Steps	Dave Cunningham
Send -Out	Diane Kocer

Participants

Includes all AGCEF Board Members

Bob Barrett	Jake Jacobson
Bill Bender	Pam Jardine
Kurt Boyd	Diane Kocer
Dave Carns	Ron Lange
Jim Crutcher	Matt Lessard
Dave D'Hondt	Bob Marconi
Terry Deeny	John McGowan
Dennis Dickert	Dan Morris
Jim Elliott	Nancy Munro
Bryan Eppler	Allan Osberg
Mac Gray	John Schaufelberger
Don Grimes	Adrienne Woods
Brad Hayes	Rick Workman
Jennifer Holm	Frank Young Jr.

Staff

Jen Holm
Diane Kocer
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Note: Numbering and lettering in this document are for ease of reference only; they do not denote priorities or levels of importance

Notes on the Process Employed on September 16

The meeting began with a brief review of the Macro Strategies that are included in this report. To expedite the work of the board representatives in this final session of the five year strategic planning process - the AGCEF staff will complete the implementation details for macro Strategies, B1, D1, D2, D3 and D4. The implementation plans for these macro strategies will be developed by staff following this meeting and presented to the Board for review in December 2015, along with the report from this meeting.

The groups were assigned four to five macro strategies each and were asked to complete a template with implementation details for each macro strategy. These documents are in this report. Each group was asked to print the indicators for success that they identified for each strategy on cards and post them on the sticky wall. These success indicators are in effect tangible deliverables over the next five years for each of the macro strategies and the group discussed those as they were presented. They marked them according to those that:

1. had the biggest impact potential either on the industry at large or on the work of AGCEF.
2. would be relatively easy to implement
3. would be more challenging and require greater effort to implement
4. should be considered as priority deliverables as this five year strategic plan is finalized.

The following pages list the macro strategies that were developed in August, the priority deliverables that were identified on September 16 and the implementation details for each of the macro strategies.

Considerations Going Forward

As the board and staff review and edit this work, it remains to integrate existing projects, re-schedule deliverables in line with staffing resources and current deadlines and move on the priorities for 2016.

As was indicated at the August meeting when the board discussed possible scenarios for upcoming trends and developments in the construction industry in the Northwest - it seems realistic to review this strategic plan certainly in year three or even annually.

Appendices

- A. The AGC Foundation Proposed Planning Process
- B. Important Milestones & People of the First 35 Years
- C. The First 35 Years: The New Story
- D. The Practical Vision for AGCEF in 2020
- E. The SWOT Report
- F. The Economic Impact of the Construction Industry in the State of Washington, 2013, Published by the College of Built Environments, The University of Washington (page one only for reference)

The Vision Component	The Macro Strategies		
<p>The Future Workforce A</p>	<p>Research the viability of a Construction High School</p> <p>A1</p>	<p>Partner with other industries (including Manufacturing & Marine) to identify core competencies</p> <p>A2</p>	<p>Partner with AGC of Washington on lobbying efforts to strengthen state support for education, training and recruitment for the construction industry</p> <p>A5</p>
	<p>Create an after school STEM program for Middle School and High School kids</p> <p>A3</p>	<p>Establish a community outreach plan that targets students, parents, teachers, counselors, and other organizations to promote career opportunities in construction</p> <p>A4</p>	
<p>Funding Sources B</p>	<p>Explore options to expand the endowment</p> <p>B1</p>	<p>Identify financial needs of all programs</p> <p>B2</p>	
<p>Expanding Continuing Education Opportunities C</p>	<p>Build training series to include additional career pathways ex: field to office workers, etc.</p> <p>C1</p>	<p>Research and expand Delivery methods for training</p> <p>C2</p>	<p>Expand current certification programs</p> <p>C3</p>
<p>Expanded Inclusiveness D</p>	<p>Diversify the scholarship & grants distribution to include students pursuing 2 yr programs & trade training</p> <p>D1</p>		
	<p>Accommodate diversity in all its forms to:</p>		
<p>Sustaining the Foundation’s Momentum E</p>	<p>Evaluate administrative space & communication technologies</p> <p>E1</p>	<p>Refresh all communication protocols for AGC & AGCEF</p> <p>E2</p>	<p>Establish sustainable practices for ongoing staff support and retention</p> <p>E3</p>

The Future Workforce - The Construction High School	
A1	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Research the viability of a construction industry high school</p>
Success	<p><i>What are the indicators of success?</i> <i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. We will have a comprehensive research study completed. 2. The Pros and Cons will be clearly documented 3. A cost / benefit analysis will be included 4. Recommendations for action based on the study will be prepared for the board.
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <ol style="list-style-type: none"> 1. We have an experienced, informed and committed board 2. The staff are experienced and ready to move on this 3. There is an industry focused high school for aerospace already established in the Northwest
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <ol style="list-style-type: none"> 1. Interview/communicate with 3-5 existing construction high schools across the country and create a report of results 2. Research local market – Boeing High School, Marysville Getschel and create a report 3. Define the school’s purpose – 4 years? School size? Targeted toward craft workers, management, or both? 4. Create a case statement
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>TBD</p>

The Future Workforce - Industry Partners A2	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Partner with other industries (including Manufacturing & Marine) to identify core competencies</p>
Success	<p><i>What are the indicators of success?</i> <i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. List of partners is defined 2. Interest level of partners to participate in this project is confirmed as high 3. Best practices within partner organizations to define core competencies have been investigated
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <p>Active partnerships exist between AGCEF and the following:</p> <ol style="list-style-type: none"> 1. Unions 2. CorePlus 3. Youth-based nonprofits – Boys & Girls Club, Treehouse, church groups 4. Community leaders 5. Military
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <p>TBD</p> <ol style="list-style-type: none"> 1. Identify partners 2. Produce case statement 3. 4.
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>TBD</p>

The Future Workforce - After School Programs	
A3	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Foster an interest in construction career opportunities to middle and high school students and their parents through an after-school mobile construction/engineering program for middle and high school students.</p>
Success	<p><i>What are the indicators of success?</i> <i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. Staff person is designated to create and manage program. 2. Bank of dedicated volunteers is formed. 3. Several schools register for program when it is launched.
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <ol style="list-style-type: none"> 1. We own a truck. 2. Bank of volunteers from scholarship recipients and CM students. 3. Active partnership with school districts and universities. 4. Existing partnerships with companies who will provide in-kind supplies. 5. Basic program and curriculum has been partially developed from Construction Adventure Camp.
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <ol style="list-style-type: none"> 1. Meet with middle and high school administrators to identify need and develop interest and plan. Schools identified will include cross section of demographics. 2. Establish committee to develop the program. 3. Review budget 4. Implement program
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>\$60,000 - \$80,000 annually</p>

The Future Workforce - Community Outreach A4	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Attract more youth to grow into the industry by promoting the many career opportunities that exist for young people.</p>
Success	<p><i>What are the indicators of success?</i> <i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. The metrics are defined 2. A number of projects are prepared and set in motion 3. A number of events are hosted and attended
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <p>Existing, strong relationships with universities and companies</p>
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <ol style="list-style-type: none"> 1. Identify youth based organizations to target 2. Identify events that attract the type of people we want to influence. 3. Create events that will attract people that we want to influence and create visuals and electronic presentations 4. Identify schools and create activities
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>Cost of staff: half-time staff person</p>

The Future Workforce - State Support A5	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Strengthen state support for recruitment, education and training of young people and for the construction industry through concerted lobbying efforts with AGC.</p>
Success	<p><i>What are the indicators of success?</i> <i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. Metrics are defined 2. Amount of necessary funding for programs clarified 3. Partnerships identified 4. Lobbying task force is named
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <p>Existing lobbying efforts with AGC, AGC already represents the construction industry</p>
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <ol style="list-style-type: none"> 1. Define the goals 2. Form a task force 3. Recruit other industry partners 4. Develop a lobbying plan
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>Cost of staff person</p>

Endowment Expansion B1	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Expand the endowment to increase the number of beneficiaries and the educational impact of the Foundation on the industry.</p>
Success	<p><i>What are the indicators of success?</i> <i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. The endowment will be expanded by X% by December 201Y 2. TBD
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <p>TBD</p>
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <p>TBD</p> <ol style="list-style-type: none"> 1. Identify programs financial needs 2. Feasibility study, if applicable 3. Create case statement 4. Launch campaign
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>TBD</p>

Program Financial Needs B2	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Identify the financial needs of all programs for next five years in order to increase recruitment, quality and industry support.</p>
Success	<p><i>What are the indicators of success?</i> <i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. Clear cost structure for each program by qtr and year 2. List of new costs anticipated by year (tools, advertizing, instruction) 3. Annual cost projection by program for next five years
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <ol style="list-style-type: none"> 1. Past budgets and known cost factors 2. A well-oiled fiscal tracking system 3. Some existing feedback from instructors and others on new and pending needs.
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <ol style="list-style-type: none"> 1. Survey faculty for anticipated new software needs 2. Review program costs for past three years and use as baseline 3. List any new costs anticipated 4. Create a budget of projected costs by program, by year for next five years.
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>TBD</p>

Training Opportunities C1	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Expand the training opportunities being offered to the industry</p>
Success	<p><i>What are the indicators of success?</i></p> <p><i>How will we know that we pulled this off?</i></p> <p>Several additional training programs are on the schedule</p>
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <p>We have existing training programs, a pool of competent teachers and many committed industry partners</p>
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <ol style="list-style-type: none"> 1. Develop a forecast where the industry is headed 2. Survey companies and identify training needs 3. Discuss existing programs with the large companies 4. Subject matter experts and create the training
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>TBD</p>

Delivery Methods C2	
The Basic Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Expand the methods for delivery of training to broaden access to a wider audience and increase our revenue</p>
Success:	<p><i>What are the indicators of success?</i> <i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. We have the demonstrated capacity to offer any class at any place 2. Course participation rates are increased significantly
Advantages that will help leverage this strategy	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholder)</i></p> <ol style="list-style-type: none"> 1. We already serve people that can't attend the physical location 2. AGC is committed to providing the hardware and software for online delivery.
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <ol style="list-style-type: none"> 1. Research new technologies and identify technologies being used by other industries 2. Select technologies that best serve our needs 3. Implement new technologies 4. Evaluate effectiveness and needs
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>TBD</p>

Continuing Education Expansion C3	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>To provide education opportunities for AGC members and non-members and generate additional sources of revenue to fund programs.</p>
Success	<p><i>What are the indicators of success?</i> <i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. Certification programs have expanded. 2. Revenue stream increased
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <p>TBD</p>
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <ol style="list-style-type: none"> 1. Obtain feedback from all Foundation instructors about needs for training certification expansion. 2. Identify accurate individual from the large, mid-size, small GC companies, as well as subcontractors, who can establish what is needed. 3. Prioritize the suggested programs based upon the perceived needs of the industry 4. Create or expand specific programs based upon priorities
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>Revenue neutral</p>

Expanded Inclusiveness D 1,2, 3	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>To align AGCEF in all its forms with the shifting and emerging demographic reality of the industry, the labor force and the Northwest Region</p>
Success	<p><i>What are the indicators of success? How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. X # of Scholarships and grants will be made available to students in two year programs and apprenticeship training by Fall 20XX 2. The Board will reflect the demographics of the industry and the region 3. AGCEF procedures and practices will reflect the philosophy of diversity 4. AGCEF programs will also be diverse and widely accessible
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <p>TBD</p>
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <p>TBD</p> <ol style="list-style-type: none"> 1. Create, distribute, and analyze diversity report 2. Review current demographics of all constituents 3. Review current demographics of all programs 4.
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>TBD</p>

Administrative Space E1	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Evaluate administrative space & communication technologies with a view to upgrading them as necessary</p>
Success	<p><i>What are the indicators of success?</i> <i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. Long-term staffing needs over next five years are identified. 2. Additional space and equipment required is defined - based on identified staffing needs above 3. Feasible growth and additional options are worked out with the property committee, facilities engineer, property management
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <p>There seems to be clarity amongst staff as to improvements in space and communication technologies that could help improve productivity and increase efficiencies</p>
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <p>TBD</p> <ol style="list-style-type: none"> 1. Evaluate current space and needs 2. Identify long-term staffing needs 3. Long-term growth needs worked out with property committee 4.
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>TBD</p>

Communication Protocols E2	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Refresh all communication protocols for AGC & AGCEF to strengthen linkages, increase efficiencies and increase productivity</p>
Success	<p><i>What are the indicators of success?</i></p> <p><i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. Partnership efforts between the AGC and AGCEF boards are continued with overlap of membership. 2. AGC board members sit on AGC EF board 3. Evidence of increased interaction between AGC board members and AGC EF is apparent 4. The strategic plans of both organizations are aligned
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <p>TBD</p>
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <p>TBD</p> <ol style="list-style-type: none"> 1. AGC and AGCEF strategic plans aligned 2. Annual evaluations of growing partnership 3. 4.
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>TBD</p>

Sustainable Practices for the Foundation E3	
Intent	<p><i>What is the purpose of this strategy and who will benefit?</i></p> <p>Establish sustainable practices for on-going staff support and retention.</p>
Success	<p><i>What are the indicators of success?</i> <i>How will we know that we pulled this off?</i></p> <ol style="list-style-type: none"> 1. Low staff turn-over and to the degree possible 2. An identified succession plan
Advantages	<p><i>What's already in place that will make this strategy very doable? (e.g., resources, people, partners, programs, staff experience, past practice, fiscal support, other stakeholders)</i></p> <p>Audit team evaluates and compares Education compensation package in relation to other non-profit entities to ensure compensation packages are competitive</p>
Action Steps	<p><i>What are the four main, big action steps required to make this happen?</i></p> <ol style="list-style-type: none"> 1. Utilizing an outside consultant, evaluate job descriptions and compensation packages with other organizations...not necessarily non-profit. 2. Identify the competition (companies) that our employees might want to seek employment with. 3. Engage services of outside consultant to interview staff employment needs. 4. Identify Foundation career pathways of current employees
Budget	<p><i>What is your estimate of the fiscal implications of this strategy?</i></p> <p>\$10K</p>

		Implementation Plan - Planning Deliverables from Winter 2016 - Fall 2020							
INITIATIVES	Strategies	2016				2017	2018	2019	2020
		Winter	Spring	Summer	Fall				
<p><u>THE FUTURE WORKFORCE A1-A5</u></p> <p><i>Recognizing that the industry is facing a critical and constantly changing workforce shortage, we intend to create relevant programs and opportunities that continue to develop and promote construction careers.</i></p>	The Construction High School A1	Research local market (Boeing HS, Marysville, skills centers) to determine existing programs with the largest and positive scale of impact. Report on findings.	3-5 Construction HS and other AGC chapters in other states researched. Report on findings	Case statement on purpose & scope	Present findings to BOT to determine next steps	Feasibility study, if applicable.			
	Industry Partners A2	Identify and confirm five industry partners	Produce case statement for justification for partnerships	Partnership and plans for cooperative practices documented.		Best practices to define core competencies identified			
	Expand School Programs A3	Objectives defined	Utilize research from A1 to start forming specific program(s)	Meetings with HS and MS administrators held		Programs' budgets reviewed	Programs implemented in several schools		
	Community Outreach A4	Objectives defined by Tomorrow's Construction Workforce Today committee.	Initiatives and programs outlined. Ex: volunteer database						
	State Support A5	Representation from Foundation approved to serve on AGC lobbying committee	Assign AGCEF person to serve as SME for education issues and work with A2. Report to TCWT and BOT.		Lobbying efforts include education initiative in state of WA	Lobbying efforts include education initiative in state of WA	Lobbying efforts include education initiative in state of WA	Lobbying efforts include education initiative in state of WA	Lobbying efforts include education initiative in state of WA

		Implementation Plan - Planning Deliverables from Winter 2016 - Fall 2020							
INITIATIVES	Strategies	2016				2017	2018	2019	2020
		Winter	Spring	Summer	Fall				
FUNDING SOURCES B1-B2 <i>To advance all programs through strategic revenue sources.</i>	Endowment Expansion B1			Identify program financial goals creating a case statement for endowment expansion	Feasibility study for endowment campaign based on A1-A6 findings.	Launch endowment campaign			
	Program Financial Needs B2		Clear, complete costs structure for each program by year developed based on A1.				Annual cost projection for all program for five years developed		
CONTINUING EDUCATION PROGRAMS C1- C3 <i>To provide relevant and quality education programs for AGC members and non-members.</i>	Training Opportunities C1		Forecast on industry directions completed		Survey results completed and interpreted		Add programs and assume brokering role		
	Delivery Methods C2	New technology for delivery methods selected	Implement one new delivery method	Identify current successful certification programs with opportunities for expansion	Budget for new technology expenses and equipment	Any class, any place capability established			
	Continuing Education Expansion C3	Feedback gathered from instructors, TCWT, HR personnel, on training needs	Certification needs of member companies collected. Identify current successful certification programs with opportunities for expansion.	Established programs prioritized	Implement as prescribed.				

		Implementation Plan - Planning Deliverables from Winter 2016 - Fall 2020							
INITIATIVES	Strategies	2016				2017	2018	2019	2020
		Winter	Spring	Summer	Fall				
<p><u>INCLUSIVENESS DIVERSITY D1</u></p> <p><i>To align AGCEF in all forms with the shifting and emerging demographic of the construction industry. Definition of diversity and inclusivity includes, but not limited to, ethnicity, gender, socio-economics.</i></p>	<p>Expanded Inclusiveness</p> <p>D1</p>		<p>Diversity report; produce findings to illustrate current demographic trends</p> <p>Review demographics of BOT and compare to findings</p>	<p>Evaluate grant and scholarship programs to ensure diversity of all aspects of industry are included</p>	<p>Diverse grant and scholarship applicant outreach</p>				
<p><u>SUSTAINING THE FOUNDATION'S MOMENTUM E1-E5</u></p> <p><i>To continually improve the mutually productive and valued partnership with the AGC of Washington, Foundation's Board of Trustees, constituents, and staff.</i></p>	<p>Administrative Space</p> <p>E1</p>	<p>Additional space and equipment needs clarified</p>	<p>Long term staffing needs for next five years identified</p>		<p>Feasible growth and additional options are worked out with the property committee, facilities engineer, property management</p>				
	<p>Partnership with AGC of Washington</p> <p>E2</p>	<p>AGC and AGCEF strategic plans are aligned</p>	<p>Document the adherence of AGC/AGCEF board partnership</p>		<p>Annual survey of both boards and staff to determine opportunities for continued strong partnership</p>	<p>Evaluate survey results; implement improvement as indicated</p>			

		Implementation Plan - Planning Deliverables from Winter 2016 - Fall 2020							
INITIATIVES	Strategies	2016				2017	2018	2019	2020
		Winter	Spring	Summer	Fall				
<p><u>SUSTAINING THE FOUNDATION'S MOMENTUM</u> E1-E5 (continued)</p> <p><i>To continually improve the mutually productive and valued partnership with the AGC of Washington, Foundation's Board of Trustees, constituents, and staff.</i></p>	<p>Sustainable Staff</p> <p>E3</p>		Employers competing for AGCEF staff identified	Career paths for staff within AGCEF identified		Staff positions and job descriptions evaluated by outside consultant			
	<p>E4 Internal Communications</p>	Create electronic monthly newsletter for BOT of both organizations and staff	Review and communicate process for BOT nominations	Foundation staff, and/or BOT members participate with AGC Washington departments; Safety, HR Roundtable, FLF, district offices, lobbying efforts					
	<p>E5 External Communications</p>	Create electronic monthly newsletter for all constituents.	Identify communications need based upon varying constituent needs						

Key: Yellow = High Priority as determined by workshop participants

Appendix A The AGC Foundation Proposed Planning Process

Component	Time Required	Deliverables
Historical Work Shop	3 hours	<ul style="list-style-type: none"> • Summary of achievements • Perceived impact • Knowledge gained • Partnerships Established • Community Perceptions & Expectations created • Phases of the history • The story
SWOT Analysis	4 hours	A study of AGCF's internal strengths and weaknesses and external opportunities and threats
The Vision Workshop	3 hours	Summary of AGCF's Practical Vision for 2020
The Macro Strategies	3 hours	The macro strategies necessary to address the major threats, capitalize on the perceived opportunities and to realize the Practical Vision
The Implementation Plan	3 hours	A detailed, 18-month action plan

Appendix B Important Milestones & People of the First 35 Years

Historical Periods	The Development Period		Time of Growth & Transition	Outreach to Higher Education	Major Outreach to the Industry heralds a Re-engagement of the Membership				
					Education In-roads to K-12	Expansion of Continuing Ed			
	1980	1985	1990	1995	2000	2005	2010 2015		
Milestones, Key Leaders, Signal Events & Turning Points	September 3, 1980, Seattle AGC Education and Community Service Foundation formed	AGC of America recognizes WA Chapter is one of best in nation	AGCEF grant to CWU funds faculty position and helps ensure program is accredited	Launch of Smart Bucks program	The Johnson Estate gives \$500m	If I had a hammer' program launched in public schools	KC & PC CC Days success		
				2,766 students enroll in classes	AGCF rebranded via the GET Smart program		Diversity outreach initiated		
	Program includes Basic Construction; Supervisory Training; Management Education workshops; Open Shop Craft Training;	\$170K donated to UW for faculty position	Foundation formally reorganized (1/1/93)	National 'Build Up' Tool kits for K-12 launched	Donor base increases 55%	New Executive Director hired (Diane Kocer)	New member & alumni relationships		
		5 AGC Student Chapters	Endowment campaign launched	\$55K in grants awarded	Annual fund raising goal met every year			ASI Investment Mgr	
		\$3K given to ANEW	\$12.5K matching grant given to CWU	19 Scholarships awarded	First Distinguished Service Award goes to Don Bocek		Cont Ed program expands		
		\$2K given to CWU Student Chapter	Annual fund raising goal met every year	Annual fund raising goal met every year	CREATE program starts (2000)	First newsletter published 10/08	Annual goal is > \$100K		
	Key leaders from the very early days include: Lou Rowley Mark Perry Nick Briscoe Bill Scott Tullus Gordon Terry Deeny Dann Sheffield Larry Johnson Bob Landau	\$3K given to Seattle Zoo	TAP Power Tools donates \$0.25 for every tool sold	Pre-apprenticeship program started at Garfield HS	Endowment reaches \$1m		Allan Osberg awarded Dist. Service Award		
		\$1500 scholarship to Stanford University	5 AGC member companies provide internship opportunities	25 K-12 teachers intern with AGC member companies	8 new environmental programs offered (storm water & others)	Camp Fire USA starts	Bob Barrett awarded Dist. Service Award		
		6 awards to K-12 students	6 grants awarded	All AGCF staff intern with AGC member companies	5 year strategic plan developed	STEPS magazine mailed (3/2007)	Lee Kilcup awarded Dist. Service Award		
		6 Full Tuition awards to UW Building Construction Program	\$15K to CWU for Constr'n Mgt program (9/94)	Grants made to UW and WSU for computer labs	1350 students take classes and labs (1997)	Many new programs launched (Construction Math, STEPS, PMDP, BIM, LEED)		Endowment reaches \$4M	
			AGCF adopts a new name (1/29/93)		All programs grow in enrollment	100% BOT Annual Fund Participation Goal (2008)		AGC renews the partnership	
			28 Scholarships awarded	Fundraising feasibility study initiated	Continuing Education programs grow by 10%	Jim Crutcher endowment created	6050 industry professionals take classes	Leadership series launched	
			All Education programs are merged		Very many requests for AGC speakers to high schools	\$80K awarded in scholarships	4200 K-12 students take classes	Endowment Draw policy changed	
			Hired professional administrator			\$28K scholarships to 14 CM students	27 teachers take internships	11,905 K-12 students take classes	
				\$300K in scholarships since 1988	Big boost in online classes	Speakers Series launched			
				\$400K in grants since 1983	Fund raising effort very successful	KCCD attracts 1500 students			

Notes: Dotted lines imply fuzzy boundaries between the periods BLUE shading denotes very signal events TAN shading denotes a turning point

Appendix C

The First 35 Years: The New Story

AGC began in 1980 as the brain child of several senior and successful industry leaders at that time. They were especially concerned about the need for industry leaders to invest in the future of the community and to 'give something back,' by way of preparing the labor force and industry leaders of the future. Passing on the fruits of their knowledge and experience to a new generation was their guiding mantra. After much soul searching and many meetings late into the night in dusty board rooms of the time they formed the Seattle AGC Education and Community Foundation on September 3, 1980. Among their first offerings were courses in basic construction, supervisory training, management education and some open shop craft training.

By 1985 this group of pioneers had established themselves within AGC national ranks and were acknowledged as the leaders of one of the nations' leading chapters in construction industry education. Significant dollars were raised from a growing membership of construction companies and among the key contributions that they made was \$170,000 to the UW for a faculty position in Construction Management. With hindsight, this was a 'breakthrough' contribution and provided needed impetus to the university's new program in construction management.

In 1993, the Foundation was formally re-organized under the wise leadership of Lou Rowley who conceived of an organizational structure and mission that has stood the test of time. In that same year, a professional administrator was hired, an endowment campaign was launched, educational programs merged, a new faculty position funded at CWU and many generous scholarships and program support awards were given to the public universities. By 1995 it had become clear to the leadership that the Foundation's investments in scholarships and program awards were paying off and so began a major outreach to higher education to further intensify the Foundation's footprint in the higher education community.

New programs were started to draw in new students, an annual fund raising campaign became a standard and successful initiative and as a result more and more students received scholarships and colleges, universities and even high schools became the recipients of AGCF investments. Not surprisingly demand for speakers from the AGC membership to talk on career opportunities at high schools became very pressing leading in many ways to a growing continuing education program for professionals in the industry.

Beginning in 2000, a major outreach to the industry led to an expanded donor base, an endowment of \$1M, the hiring of a new director and a host of new programs - many of which were directed at the 'seed corn,' of the next generation of industry leaders. This emphasis on K-12 attracted very significant numbers of young people into AGC programs, seminars and career events. What took root were manifestations of the founder's vision of an organization that attracted and prepared the next generation of industry managers, engineers, crafts people and leaders. The foundation's fiscal support from the membership has been signal and besides a big growth and expansion of continuing education programs we are seeing a growing presence of online course offerings and a wide range of technical topics and issues addressed in the quarterly program.

At this vantage point of 35 years and looking back it seems clear that the basic vision and intentions of the founders have borne fruit giving the new leadership a very broad base upon which to build - not least of which is an endowment fund of \$4,000,000.

Appendix D The Practical Vision for AGCEF in 2020

Towards Expanding the Educational Infrastructure II		Towards Building the New Foundations I		Towards Strengthening the New Pillars III	
Growth Through Mentoring A	Life-Long Learning B	Positive Public Perceptions C	The Future Workforce D	Expanded Inclusiveness E	Show Me the Money! F
AGCEF brokers Industry mentors to recruit youth into the industry A1	AGCEF collaborates with other training organizations B1	Community Outreach and Awareness C1	AGCEF & AGC build the new Construction Academy H.S. D1	AGCEF is diverse E1	\$1m per annum in incoming grants F1
AGCEF provides career counseling services to all member company employees (membership benefit) A2	AGCEF offers additional certifications B2	AGC Video gets Emmy Award C2	The new STEM/Construction High School opens D2	Tapping new avenues for finding labor E2	Financial support for all activities F2
	Complete on-line training system B3	AGCEF creates eye-catching recruitment video for the industry C3	AGCEF provides pre-requisite classes for college D3	All employee types are served by AGCEF E3	Ensuring staff succession F3
	Training referrals are consistently high B4	Successful Social Media Strategy for Generations Y and Z C4	Intensive math & science summer camps on for K-12 teachers D4	Educational programs are diverse E4	More unrestricted endowments F4
	On-demand, online, education webinars B5	CM Degree is the new MBA C5	AGCEF provides equal number of scholarships to pre-apprenticeship as four year D5	Board represents of the diversity of the industry and the demographics E5	The "2020" Program\$ F5
	Expanded two-year degree/trade supports B6	Construction is the preferred career choice in K-12 C6	Strong presence in K-12 based on new partnerships D6	AGCEF has an impactful diversity program E6	Endowment has grown X% over 2015 level F6
	Virtual Lab in building with state of art equipment & training B7	AGCEF is the new 'Google' C7	New recruiting tools for industry D7		
		Industry public image undergoes a big makeover C8			

Appendix E The SWOT Report

Internal Strengths Can be Changed and/or Developed by the Foundation			
Strong Human Resources A	A Strong Financial Foundation B	Engaged and Committed Partners C	Programs are valued, Pro-active and Mission Driven D
Current staff are experienced and talented with diverse skills A1	Funds are wisely distributed B1	Great relationships with universities and other organizations C1	Highly respected, quality educational programs D1
Leadership is strong and passionate, and staff are mission driven, enthusiastic and gutsy A2	Funds are managed well with a CPA from the industry always on the executive committee B2	The legacy and vision of the 'founders' is alive and well amongst staff, instructors, students and board members C2	A knowledgeable, experienced and dedicated pool of instructors D2
Staff are 'customer centered,' in all aspects of the work A3	Foundation has a proven capacity for fund raising B3	The Board is diverse and engaged C3	Solid base of popular programs D3
Staff demonstrate their accountability and acumen in their work A4	Foundation actively manages a real & accurate budget B4	There is an active and broad outreach to the community C4	Programs are comprehensive and meet the needs of members D4
Staff team is collegial, nimble, efficiency oriented, has clear and distinct roles and works well as a team A5	The updated endowment policy allows for more funding B5	AGCEF has a core of engaged industry leaders ready to contribute time and money C5	Programs are mission driven D5
The staff can be relied on to "know what's going on" A6	The AGC building and location provides a recognizable and desirable space for operations & industry networking B6	AGCEF has the capacity to look back in time and forward C6	Program offerings reflect a responsive attitude to the market D6
Staff support one another and are skilled in relationship building A7		AGC member firms are passionate, and are supportive if approached appropriately C7	
	AGCEF structure holds the Exec Director accountable B7	Executive committee has long tenure on the board C8	

Appendix E The SWOT Report

Internal Weaknesses Can be Changed and/or Developed by the Foundation			
Communications with the different generations on staff, with customers & with board members A	Relations between AGC and AGCEF B	The Untapped Market Potential C	Available Human Resources Limit What is Possible D
The Board Nominating process A1	AGC Board is perceived as out of sync with the Foundation mission, and not familiar AGCEF programs B1	Program review is conducted internally, and a comprehensive program review process has yet to be developed C1	Volunteers are not utilized as fully as they might D1
The distribution of fiscal resources are unclear to many board members A2	The working relationships with AGC management are weak B2	Marketing of courses and grants is too limited C2	Staffing level is too low for the work load D2
All program goals are not clear to many board members A3	AGC and AGCEF priorities for funding and execution of programs are not coordinated	Outreach to the younger generations is weak C3	AGCEF only taps a small pool of volunteers D3
AGCEF is unclear on how to communicate with Millennials A4		Workforce development program practices are limited in scope due to focus on specific age groups C4	
		AGCEF is unclear on how to keep technical programs relevant C5	Demands to meet operational expenses and other needs impedes pursuit of new developments D4
	B3	AGCEF too dependent on ConEd course revenue, and the necessity of raising revenue blocks new program development C6	The limited HR resources tends to generate silo thinking D5

Appendix E The SWOT Report

External Opportunities Cannot be Controlled by the Foundation				
Time is ripe for powerful new branding message from AGCEF A	Training Expansion B	The Very Strong Economy C	Partnership Growth Potential D	Student Demand for Training E
AGCEF has a strong story to market to the industry A1	Mid and small size companies have a need for AGCEF training and classes B1	Fed/State grant funding can be available in this strong economy to AGCEF C1	Partnerships with other training organizations offer many possibilities D1	A growing demand for two year degrees in construction E1
There is a new and potential marketing opportunity for AGCEF A2	There is a real workforce need for knowledgeable, field and office leaders B3	The industry is huge and diverse C2	Good partnership options with other trade organizations e.g., AIA D2	A perceived demand for scholarship expansion E2
There is an increased demand for AGCEF Leadership programs like STP A3	The use of technology in construction management requires ongoing training B4	The industry offers plenty jobs, career opportunities all at competitive salaries C3	Best Practices to improve and expand the services to the industry are available from other industries D3	
	The market for AGCEF programs is very evident B5	The short-term outlook for the industry looks very promising C4	Real possibilities exist in networking with local non-profits e.g., Gates F. D4	
		The Economic Impact Report on the industry from the UW highlights new possibilities C5	Relations with Higher Education programs have lots of potential D5	

Appendix E The SWOT Report

The External Threats Cannot be Controlled by the Foundation			
The prevailing public IMAGE of the Construction Industry is inaccurate and negative A	The Supporting Pillars of AGCEF may be threatened B	Competition from other organizations could reduce enrollments and revenue C	Misguided Pending Legislation threatens the industry D
Within the K-12 system the industry is perceived as one of last resort despite the opportunities that exist A1	The construction economy is volatile B1	Competition from other training organizations threatens enrollments C1	Pressure on the legislature to cut K-12, CTE programs could reduce the future labor force for the industry and for AGCEF programs D1
Construction is not widely recognized as a profession among teachers and other professions A2	Swings in the Global financial markets affect endowments and annual donations B2	Some online vendors of construction education threaten enrollments C2	State legislation is in a process that could reduce AGCEF enrollments, donations, and general support D2
Many parents of K-12 students reinforce the 4year narrative and negative images of construction A3	Limited number of new donors finding AGCEF via Board members B3	Large General Contractors often have their own training programs C3	The absence of a concerted lobby by AGC members on behalf of guarding K-12 CTE programs may result in a major loss to the industry and AGC members. Ex: State education budget
	AGC's mixed messages to AGCEF distract staff resources from the AGCEF Mission B4	Some Instructors without 'contracts,' with AGCEF use students as sales opportunities and thereby compromise AGCEF program integrity	
The diversity of the construction industry complicates attempts to market the career opportunities to young people A4	The non-supportive attitude of AGC mgt presents marketing, identity, staffing & donor cultivation challenges B5		
The cyclical economy shows young people and their parents that periods of unemployment do occur A5	Physical space assigned to classes, offices and conferences of AGCEF are too limited B6		

Appendix F
**"A Study of the Economic Impact of the Construction Industry
on the State of Washington | 2013 Update"**

TECHNICAL PUBLICATION NO. 28

**A STUDY OF THE ECONOMIC IMPACT
OF THE CONSTRUCTION INDUSTRY
ON THE STATE OF WASHINGTON
(2013 Update)**

**Sponsored by a Grant from the
Associated General Contractors of Washington**

Prepared By: John E. Schaufelberger

**COLLEGE OF BUILT ENVIRONMENTS
University of Washington**

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