

## Strategic Plan (2018-2020)

The key Strategic Plan Objectives for IPWEA are:

1. **Increase Federal Government Engagement**
2. **Facilitate International Growth**
3. **Develop Financial Sustainability**
4. **Improve IPWEA's Operating Model to Grow the Overall Pie**
5. **Develop Technology Strategy**
6. **Implement Membership Growth Strategy**
7. **Achieve Positive Collaboration**

## Two-Year Action Plan (2018-2020) (summary)

From the above Objectives, the following are prioritised by the Board over the ensuing two years:

1. **Grow the overall pie**
2. **Achieve positive collaboration across the group**
3. **Achieve international growth**
4. **Increase member value and hence grow membership**

## Delivery of the Two-Year Action Plan (summary)

1. **Grow the overall pie**
  - a) **Training (Opt-In Model):** Australasia will investigate an opt-in model that will allow the Divisions, who choose to opt-in, to co-deliver Asset Management training in exchange for the Divisions promoting Australasia's core products.
  - b) **Collaboration Division-Division:** Facilitate greater exchange of product/service collateral, utilising each party's unique skill sets and influence to develop programs that are shared and mutually beneficial.
  - c) **Collaboration Division-Australasia:** Facilitate greater exchange of information and collaboration on common shared issues which can be identified as being mutually beneficial.
  - d) **Australasian-wide Income Models:** These models will focus on growing income for each Division and not redistributing existing income from one Division to another.
2. **Achieve Positive Collaboration**
  - a) **Training:** work together to jointly present training as outlined above.
  - b) **Improve IT:** Conduct a review of technology platforms to ensure they address the needs of Australasia and Divisions to enhance user experience for members.



- c) **Improve website:** Implement enhanced content and format of website which is being progressively rolled out including new Membership CPD, e-book subscriptions, and Learning Management (LMS) systems.
- d) **Improving Relationships:** Utilising Executive Officer meetings to develop positive, functional, and mutually respectful relationships.

### 3. Achieve international growth

- a) **Increase online products:** As outlined above, a managed move to online products will allow IPWEA's products and services to be accessible all around the world.
- b) **Continue to grow our North American & Canadian market:** the early success that has been achieved in Canada (and USA), requires nurturing, resourcing and marketing to continue to build the pool of asset management professionalism in these respective countries.
- c) **Continue to support Asia:** as our closet international neighbour, we should be cultivating the early interest that has been shown from Asian countries.

### 4. Increase member value and hence membership growth

- a) **Review Beaton Survey 2017:** Take key findings from Beaton membership survey and develop action plans to address shortcomings and enhance current 'good' to 'excellent' perceptions. Apply as many best practice learnings across the group as can be managed/resourced.
- b) **Increased online products/services:** As outlined above develop an operating model that allows for more online resources for members.
- c) **CPD:** Specifically address impending CPD needs of Divisions and members. Specifically implement a CPD automated diary management and record keeping system for members. Improve 'Library' of IPWEA resources for members to access when they need it.
- d) **Member Engagement Dashboard:** Implement a member engagement dashboard report which rewards and acknowledges members for greater IPWEA participation, attendances, engagement. Improve Forum use and implement categories of Forums to build upon success of AYM (and allow for segmentation).
- e) **Divisions to develop new membership recruitment plan:** Divisions to develop an accountable new membership growth target, strategy, and implementation plan. YIPWEA to develop strategies and accountable plan to convert students into fee paying members. Develop increased engagement of retired/senior members. Attempt to establish corporate membership model. Develop agreed 'common value membership proposition' for marketing to current and proposed members.
- f) **International:** Increased international market penetration may lead to increased international membership and product/services sales.



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- g) **Government influence:** Australasia and Divisions to increase engagement with Australian/NZ/State governments. Australasia to assist Divisions to achieve consistency of application of products/services/policy (acknowledging differences which may apply for NZ).

## 5. Commitments

To achieve the goals articulated at the start of this Action Plan, there will need to be commitment to the following by all parties:

- i. To demonstrate a maturity to accept best-fit compromise for the greater common good of the organisation;
- ii. For IPWEA Directors to advocate Australasia best-fit decisions, and the rationale behind them, to their Divisional Boards and Executive Officers in order to make agreed actions a reality at each Division;
- iii. For Executive Officers to work genuinely and collaboratively, with a willingness to adopt and implement best-fit solutions for the common good of the organisation as a whole.