APT 2021-2026 STRATEGIC PLAN

APT’s Mission: Advance appropriate traditional and new technologies to care for, protect, and promote the longevity of the built environment and to cultivate the exchange of knowledge throughout the international community.

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Introduction

The Association for Preservation Technology International (APT) embarks on a strategic plan every five years to reimagine and recalibrate the organization’s priorities, goals, and actions. Critical to our success is delivering technical content to practitioners who preserve the built environment. This is achieved through keeping our mission at the forefront of our actions while considering the evolution of new technologies that support the work at hand so that our members stay current with rapid changes and modes of delivery.

To set the stage for the development of a new strategic plan, a task force was assembled. The aims of the task force were to evaluate APT’s past performance, develop a framework for information gathering, and distill complex information along with overarching themes from the collective voice of the APT Board of Directors. A recommended strategic direction for 2021-2026 was the overall goal.

In reviewing past performance, it is evident that APT had extraordinary success in some, but not all, aspects of our prior strategic plan. By breaking down our priorities into measurable metrics, it is our objective that this plan will provide a working document which will guide actions that enable APT continuity as the organization evolves.

The board collectively met to discuss and evaluate the distilled data from our 2020 fall survey. During these breakout sessions, facilitated by Karen DeShon of Coetic, three overarching themes emerged which became Strategic Priorities:

I. Prioritize Technical Content
II. Improve Organizational Effectiveness
III. Widen APT’s Reach

With these strategic priorities established, members of breakout groups met to refine the goals and actions for each priority. The implementation of aligned committee actions will allow APT to achieve the strategic goals put forth.

APT comprises experts in preservation technology with an aim toward international growth and improving content delivery. In this past year, we expanded our outreach and communicated with larger audiences in ways never before imaginable prior to COVID-19. In fact, APT has utilized the tools required to communicate during the pandemic as an opportunity for improved communication and outreach. Utilizing these tools has already propelled us forward in achieving some of our planned strategic actions.

Preservation and conservation philosophical understanding serves as the framework when applying technological approaches. We look forward to committee input to further define strategic actions and develop metrics which are reflective of our common goals.
Overall Strategies

When distilling the information generated from the breakout groups, common themes emerged which are applicable to each strategic priority and to improving the organization’s efforts to streamline information. The common themes are categorized as follows:

1. Communication: Improve communication across the board and membership. Develop organizational communication platforms for committees, develop distribution lists for intra-committee communications, and a membership blog.
2. Bylaws: Update Bylaws to be reflective of organizational changes and growth
3. Administrative Assistance: Acquire further administrative assistance to allow for more productive use of volunteer time.
4. Calendar: Create an organizational calendar for committees and chapters; reduce duplication of efforts.

Within this document, each strategic priority has three strategic goals, and each strategic goal has a list of associated strategic actions. To assist the execution of the strategic plan, we identified the “top three” (most important) actions and “first three” (to be done first) actions for each strategic priority.

A core value underlying the strategies of this plan is that the application of technology must be based on a philosophical understanding of why APT exists.

Organizational Matrix of Strategic Plan

The matrix on the following page illustrates how strategic goals may align with more than one strategic priority. Expanding awareness and understanding of the preservation ethics needs to be considered when pairing goals with priorities.
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Strategic Priority I

Prioritize Technical Content

Why: Technical content is core to APT’s mission - it drives the knowledge and expertise that accomplish our impact. In APT’s early days, there were practical and technological limitations on information distribution. Today, the capacity exists to disseminate best practices and innovations in historic preservation globally. In our strategy survey, we heard a clear demand to prioritize technical content as a valued resource for APT members. Therefore, technical content prioritization must be informed by international conservation principles.

Strategic Goals

I. Attract, develop, promote, and share excellent technical content.
II. Expand outreach by utilizing new methods of delivery.
III. Focus conference events on technical content.

Top 3 Actions:

- Generate ideas for greater collaboration between committees.
- Develop new methods of content curation along with distribution beyond the Bulletin and Practice Points.
- Change conference abstracts requirements so that submissions lend themselves to rapid transformation to a stand-alone written document. i.e. technical white papers (authoritative report giving information or proposals on an issue), publication of abstracts, conference proceedings, technical brief items for *Communique*.

First 3 Actions:

- Implement a bi-monthly meeting of Committee Chairs to discuss and coordinate activities. Develop a structure for discussion dissemination and initiatives from these meetings to the Board of Directors.
- Investigate digital platforms for communication between committees, members, board, and other stakeholders.
- Improve conference content through a vetting process so that the end-product is more usable in a variety of ways - better abstracts, white papers, proceedings to published works.

Strategic Goals & Strategic Actions

I. Attract, develop, promote, and share excellent technical content.
   1) Increase emphasis on preservation technology (all committees) – ongoing.
   2) Develop a presentation series that focuses on emerging materials technology in architecture to fill gaps in knowledge (Technical Committees and Academics and Research Committee).
   3) Invite and expand technical content from technical committees, students, new members, and organizational partners (Training and Education, Partnerships and Outreach, Memberships, Student Scholarships).
   4) Investigate adding a regularly scheduled spring event for technical content - workshop, symposium, colloquium.
5) Create planning frameworks to support development of symposia, workshops, and training at the local level, i.e. chapters.

6) Hold a forum to bring together technical committee chairs, academic representatives of preservation/conservation programs, along with national preservation research organization representatives to develop a list of research needs and priorities.

7) Establish a mentoring program to connect preservation professionals with graduate students to improve the quality and relevance of graduate level research.

8) Identify APT members involved in organizations creating and maintaining industry standards, e.g., ASTM, ACI, NACE, with the goal of providing a mechanism for them to report back on their activities to the membership at large.

9) Emphasize technical content in existing publications:
   (i) *Bulletin* (Publications, technical committees)
       a. Explore publishing options including digital that would allow for more rapid distribution to a wider audience.
       b. Continue to actively solicit papers for the Bulletin; prioritize papers on emerging preservation technology issues and gaps in preservation technology knowledge or where updates are needed.
       c. Improve awareness of the peer review process.
       d. Promote development of a review article series that presents a summary of current research on technical topics.
       e. Consider evolving Practice Points to a stand-alone publication delivered more frequently than the Bulletin.
   (ii) Ensure that publication rigor is acceptable for academic researchers’ credential review (Academics and Research, Publications, Conferences).
   (iii) Partner with NCPTT - share and develop mutually beneficial content (Publications, T&E, technical committees).

II. Expand outreach by utilizing new methods of delivery to improve accessibility and discovery by wider audiences.

   1) Increase outreach to potential members, cross-disciplinary organizations, students, and chapters to attract membership and grow APT name recognition through methods outlined in Strategic Priority III.
   2) Develop and investigate digital mechanisms as a way of communicating different types of information outside of the traditional publications.
   3) Develop a member forum that encourages real-time exchange of technical information and ideas.

III. Focus conference events on technical content.

   1) Establish a “Materials and Technology” track as a requirement for the annual conference.
   2) Clearly state in the “call for papers” for the conference that submissions with technical content will be prioritized over case studies.
   3) Increase the length of the papers and reduce the number of conference events to allow for more discussion of the material presented.
   4) Host virtual committee meetings before the conference, when applicable, to ensure technical content is being prioritized.
   5) Highlight the work of the technical committees at the conference.
   6) Establish a mechanism to produce a stand-alone conference publication of abstracts for paper sessions and other events.
7) Consider an annual forum on the future of preservation technology (COF, rotation of technical committees)

Strategic Priority II

Improve Organizational Effectiveness

Why: We need a structural reorganization to align our size and complexity to achieve our organizational goals and mission. This is evidenced by the fact that our bylaws are more than a decade old and our board is operating, with a few exceptions, as we did 20 years ago. Improving organizational effectiveness will help APT achieve as its core mission. Developing an effective hierarchy will enable the organization to optimize use of volunteer time, provide structure for decision-making, maintain organizational decision-making history, and proactively manage finances.

Strategic Goals:
I. Optimize volunteer time to allow greater prioritization of technical content development and delivery.
II. Improve oversight, accountability, communication, coordination, and eliminate redundancies within all levels of APT by leveraging management best practices.
III. Formalize and document approach to short term & long-term financial management to increase board awareness of how finances are managed and use as future predictors.

Top 3 Actions:
- Optimize volunteer time to allow greater prioritization of technical content development and delivery.
- Overhaul and maintain a clear operational structure, including focusing on the Executive Director role.
- Maintain continuity and integrity of board and committee responsibilities, tools, and information.

First 3 Actions:
- Executive Committee to commission task force to revise the operational structure and onboarding processes by proposing an alternative organizational structure that can create a planning horizon, and be maintained through operational transitions, including focusing on management as well as administrative roles, such as that of the Executive Director.
- Commission task force to determine the best way to add an additional layer of management between the Board of Directors and the technical and standing committees, aimed at optimizing the efficiency of committees.
- Commission a task force to develop solution(s) to improve administrative assistance overall in APT and specifically for Training and Education efforts to allow volunteers to focus on content rather than facilitation and improve quality control and consistency of work products.

Strategic Goals and Actions
I. Optimize volunteer time to allow greater prioritization of technical content development and delivery.
1) Develop cloud-based committee platform.
   (i) Include membership lists, meeting agenda, meeting minutes, schedule, work products, onboarding materials, online messenger platform.
   (ii) Improve communication between committee members.
2) Commission a task force to develop solutions to improve administrative assistance overall in APT and specifically for Training and Education efforts to allow volunteers to focus on content rather than facilitation and improve quality control and consistency of work products.
3) Consider hiring Training and Education Coordinator
   (i) Develop T&E event approach: comprehensive, consistent event promotion, management, messaging, branding, and event planning guide/standards
      a. Update and maintain guides/tools to improve continuity of event planning.
   (ii) Develop and maintain comprehensive/consistent approach to committee management, running meetings, committee communication
   (iii) This person needs to be a thoughtful bus-driver, and provide more than simply administrative assistance.
4) Consider increasing administrative assistance in APT overall.
   (i) To include meeting minutes, agenda, schedule management, conference call scheduling, access to committee resources, website management, calendar updates.
   (ii) Strategically prioritize volunteer resource development and management.
5) Provide structured, consistent board and committee chair onboarding as turnover occurs.
   (i) Create a structured onboarding program for board members.
   (ii) Create structured onboarding program for committee chairs.
6) Facilitate transitions by creating a create planning horizon, information turnover, and easy access to lessons learned.
   (i) Create a user-friendly repository for committee knowledge and decisions.
   (ii) Include transition planning as a regular agenda item at board and committee meetings.
7) Create and maintain best practices manuals for committees and board.

II. Improve oversight, accountability, communication, coordination, and eliminate redundancies within all levels of APT by leveraging management best practices.
1) Overhaul and maintain a clear operational structure.
   a) Hire/establish a permanent Executive Director and clearly define the level of leadership within the organization.
   b) Create a comprehensive organizational graphic to highlight lines of authority, chains of communication, and decision points.
      i) Review this graphic on an annual basis.
      ii) Clearly define types of decisions made at each level of the organization.
         (1) Allow for efficient decision-making by creating checklists for ideas moving upward in the chain of command.
   c) Update the bylaws to support the re-organized structure.
      i) Activate Bylaws committee.
ii) Develop the Bylaws.
iii) Approve Bylaws.

2) Set and focus on priorities with a much longer perspective by creating an administrative management structure to work with the Executive Director to manage committees.
   a) Commission task force to determine the best way to add an additional layer of management between the Board of Directors and the technical and standing committees, aimed at optimizing the efficiency of committees.
      i) Consider two councils of committee chairs, one for technical committees and one for standing committees (or possibly one combined council). Consider having the Executive Director run the meetings.
      ii) Consider how the Training and Education Committee and Development Committees might have to work differently to be efficient and effective.
      iii) Encourage productive overlap between committees and strong collaboration to eliminate redundancies and encourage synergy in shared pursuit of excellent technical content and sharing.

III. Formalize and document approach to short term and long-term financial management to increase board awareness of how finances are managed and to use as future predictors.
   1) Reorganize financial statement to show expenses and revenue of each business unit coupled together with a subtotal.
   2) Encourage the entire organization and each committee to look for creative ways to increase revenue and reduce expenses.

**Strategic Priority III**

**Widen APT’s Reach**

*Why:* Promoting preservation technology to the international community is core to APT’s mission. Improving our exposure will provide technical information to those responsible for the built environment, as well as drive membership and revenues by increasing attendance at events and website usage. In our strategy survey, members had a clear desire to reach out to currently underserved industry segments and geographical areas. By doing so a broader cultural awareness among all who engage in preservation activities will occur.

**Strategic Goals**

I. Increase and enhance membership.
II. Improve visibility.
III. Expand outreach to underrepresented groups, international audience, partner organizations, and educational institutions.

**Top 3 Actions:**
- Update website as noted below.
- Develop and disseminate technical webinars to (see also Strategic Priority I).
- Develop and support worldwide chapters.

**First 3 Actions:**
• Upgrade and develop social media presence.
• Develop chat room discussion forums.
• Establish mentors and networking for emerging professionals.

Strategic Goals and Actions

I. Increase and enhance membership
   1) Increase membership support for students and emerging professionals (volunteers/committees).
      (i) Explore developing conference scholarship for emerging professionals.
      (ii) Explore developing emerging professional advisory group.
      (iii) Promote corporate support for emerging professionals to attend conferences (possibly scholarships or matching grants from APT).
      (iv) Increase ties between chapter membership and APT membership.
   2) Engage new members (Membership Committee to develop program; administrative support to implement)
      (i) Provide mentor to first-time conference attendees at the opening reception.
      (ii) Provide networking opportunities for new members, at Chapter or Conference events.

II. Improve visibility
   1) Continue to increase presence and engagement on social media (Publications Committee).
   2) Update Website: hire appropriate design/support staff (assisted by administrative support).
      (i) Modernize: more contemporary feel.
      (ii) Improve diversity of web images.
      (iii) Improve website positioning and search engine optimization.
      (iv) Add “Get involved” button.
      (v) Support chat room discussions as member-driven web content.
      (vi) Provide more information on website for community of practice outside APT membership.
      (vii) Use regularly-scheduled webinars to drive web traffic.
      (viii) Share chapter content.
      (ix) Develop APT YouTube channel.
      (x) Post translated information.
   3) Publicize and promote APT Awards, especially Fischetti Award (administrative support).
   4) Publicize and promote APT Recognized Professional program (administrative support).

III. Expand outreach to underrepresented groups, international audience, partner organizations, and educational institutions.
   1) Underrepresented Groups:
      i) Continue Community Engagement Projects (Inclusion Advocacy Committee).
(a) Develop and refine process using lessons learned to date (in process).
(b) Consider professional help, organizing/working with volunteers.
   ii) Improve diversity of web images; see also Website above (administration, volunteers).
   iii) Utilize Academics and Research Committee to reach underrepresented groups: institutions, researchers, university students.
   iv) Utilize Inclusion Advocacy Committee and local chapters to reach high school students.
      (a) Encourage inclusion at chapter level.
2) Expand international presence:
   i) Support existing international chapters, especially those in disadvantaged areas (Executive Director, Chapters Committee, Partnerships and Outreach Committee).
   ii) Increase translation in publications, on website (especially committee pages) and at events (administrative support, Publications Committee).
      (a) Support language translation at chapter level.
   iii) Develop virtual “Globinar” concept for APT conferences (new T&E coordinator, Training & Education Committee).
3) Engage with partner organizations:
   i) Leverage APT’s mission and focus on strengths in combination with that of other like-minded organizations (Executive Director, Partnerships and Outreach Committee).
   ii) Utilize partnerships to distribute technical content in partner publications/memberships.
   iii) Provide technical course content that include learning units (coordinate with AIAU & AIA HRC for architects; find opportunities for engineers and other disciplines) (administration: implementation; volunteers: content).
   iv) Specifically target like-minded organizations for teaming opportunities for workshops (Partnerships and Outreach, Technical Committees) (in process).
   v) Engage with state organizations (SHPO, state-wide preservation organizations) (volunteers) and NCSHPO.
   vi) Encourage joint activities at chapter level (holiday mixers and other joint events).
4) Engage with educational institutions (administration: implementation; volunteers: content):
   i) Develop recorded technical content modules for use at universities/colleges in:
      (a) Historic Preservation programs
      (b) Architecture programs
      (c) Engineering programs
      (d) Material science programs
      (e) Sustainability programs
      (f) Trade schools, trade organizations
   ii) Develop guest lecture program for program listed above.
   iii) Include local universities in Community Engagement Projects
   iv) Develop high school/STEM module or activity
   v) Coordinate with programs local to conference location (consider offering complimentary registrations for student volunteers)