INTRODUCTION

For the past several months, BOMA Canada has dedicated considerable effort to the development of a strategic plan that will guide the organization’s purposeful activity for the next three to five years. Discussion and consultation with Board members, NAC members, the CSOC and other key stakeholders have produced a rich inventory of ideas and perspective. BOMA Canada’s leaders, with the assistance of third party consultants, The Portage Group, have identified key strategic direction and goals for review, assessment, and Board approval. This document provides an overview of that direction and those goals.

STRATEGY IN LEADERSHIP

As an organization, BOMA Canada needs to be focused on creating and delivering value to all its stakeholders, including its members, and on serving and advancing their interests. To accomplish this successfully, BOMA Canada will have to strike a balanced role: a role that effectively combines forward-looking stewardship with a responsiveness that fosters inclusion and consistency. In short, BOMA Canada needs to lead.

We strongly recommended that BOMA Canada exercise strategic leadership in three critical arenas: (1) National Leadership, (2) Thought Leadership, and (3) Shared Practices Leadership. A visual representation of these ideas is attached to this document in Appendix 1.

(1) National Leadership

Under the rubric of national leadership, there are fundamental strategic elements that reflect the essence of BOMA Canada's four pillars: BOMA Network, BOMA Building, BOMA Professionalism, and BOMA Voice.

A. BOMA BEST® is a premier program that represents a significant source of BOMA revenue and institutional credibility. This program, overseen nationally and administered both nationally and locally in a franchise-like manner, is poised to extend its reach and impact. BOMA Canada has the opportunity to significantly improve and expand the program. This is work that should be regarded as the organization’s top strategic priority in order to maximize opportunity and minimize any possible risk. No other priority discussed in this report should be pursued if it imperils progress on BOMA BEST® given how important this program’s stability is to the organization’s viability and to nearly all of its members.
Objective:

Consistent with the unanimously approved Business Plan, BOMA Canada must advance the renewal of BOMA BEST® as its top priority. This renewal includes both Investment/Improvement and Growth:

**Investment/Improvement**
- Launching the new BOMA BEST® brand and ensuring brand consistency
- Creating a robust national marketing strategy and executing on it
- Completing the transition to the new IT platform
- Developing new content known as BOMA BEST® 3.0
- Finalizing the Tenant Module
- Advancing the Climate Change Module
- Ensuring that verification is consistent
- Creating a uniform or near-uniform experience for all BOMA BEST® users

**Growth**
- Advancing the Portfolio Program
- Pursuing annual, subscription-based certifications and, in the medium term, seeking to replace the current triennial certifications
- Expanding into the United States, China and other countries
- Fostering a culture with the Locals of sales and growth over a culture of order taking.

B. BOMEX® is an event-based opportunity to extend BOMA Canada’s brand, community and mission while creating learning and networking opportunities for members. Though the event has been successful and profitable, there is a strong sense that it needs renewal or will wither. Moreover, there has been a tension between the imperative to increase the good will generated from BOMEX® vs. the imperative to increase income from BOMEX®. Finally, the representation from different Locals (and their leadership) varies dramatically, providing obvious opportunity for growth in attendance. In short, BOMEX® should be reviewed, with particular focus on its reach, focus and impact.

Objective: Complete the current review of BOMEX® and set reasonable metrics for success, such as increased positive feedback (in a standardized, annual post-BOMEX® survey), increased overall attendance and increased attendance from under-represented Locals.

Note: As noted above, BOMEX® both creates good will and generates income. Focusing primarily on good will (via a successive series of outstanding conferences) will put these two competing objectives into symbiosis, since good will generated from consistently great conferences will lead to more people attending and more income. Focusing primarily on income, however, risks
undermining the symbiosis, since it tends to lead to cutting costs, which reduces the good will and, over time, the revenue too. Therefore, for BOMEX® to succeed, it must be known to be the best conference of its kind – period, and Local Hosts must invest significant money to ensure its ongoing success.

C. AWARDS programs represent a highly visible and well-appreciated platform to celebrate excellence and are particularly supported by the NAC. BOMA Canada is uniquely positioned not only to preserve and enhance the impact of awards programs but to create, with appropriate consultation, new opportunities for industry excellence.

**Objective:** In consultation with stakeholders, institute new award categories that promote excellence and that reinforce outcomes associated with 2015 strategy, e.g. contribution to BOMA BEST®, best new productivity enhancement, best results in training and education (Building Operator Certification), best collaborative initiative (e.g. the Quebec Building Classification Guide). BOMA Canada could also advance other awards that are situated more traditionally within the current awards context and which have been discussed already, such as a series of National Green Building Awards and a Most Improved Building Award.

D. While perhaps only presenting a limited number of opportunities for direct action, ADVOCACY is indicative of the opportunistic mindset that BOMA Canada needs to leverage in order to strengthen its presence and its brand. Recognizing and acting upon opportunities to influence decision makers has direct and indirect positive effect for members.

**Objective:** BOMA Canada should consider advocacy broadly, with a focus on diverse stakeholders including elected and unelected officials, private sector industry leaders (including those who sit on the NAC), non-profit sector industry leaders (e.g. BOMA International leadership, leaders of other industry organizations, Evergreen), the media, etc. Regular contact with leaders in Ottawa is vital, as is ongoing networking. BOMA Canada should also survey the NAC to see if there are any national advocacy objectives that it could pursue with lobbying on Parliament Hill, perhaps in partnership with others, perhaps with a fly-in lobby day on Parliament Hill.

(2) **Thought Leadership**

With regards to Thought Leadership, BOMA Canada has a significant strategic opportunity to create value and reap rewards on a number of levels – financial, institutional, and organizational.
E. RESEARCH focused on current and emerging issues can create significant value for stakeholders while enhancing BOMA Canada’s institutional presence.

This component of strategy generates a significant, positive response from members, who perceive it to be a natural function for BOMA Canada.

**Objective:** Develop a white paper on productivity enhancements/cost control initiatives for building owners and managers that are in evidence or emerging within Canada or internationally. Consider partnering with other organizations, such as BOMA International. Seek opportunities to expand the National Green Building Report as a more research-focused document.

Translation of identified trends and practices to viable domestic initiatives could inform activity in relation to the Productivity Tools and Services (see below).

F. EDUCATION AND TRAINING continues to be a focal point. The introduction of the Building Operator Certification Program directly addresses industry needs and **signals a strategic opportunity for BOMA Canada to create further value through a proactive approach to assessing and responding to training and/or exam preparation needs.**

**Objective:** As the Building Operator Certification Program is ready for the public, **conduct a training needs analysis** which could point to opportunities that BOMA Canada may either provide or outsource to a third party within a strategic partnership, ideally while generating revenue for the organization.

G. STRATEGIC PARTNERSHIPS represent a clear opportunity for BOMA Canada to establish industry alliances and potential alternate revenue streams. Introducing products and services that may augment value and revenue streams has the potential to partially offset risks associated with reliance upon BOMA BEST® as the primary revenue generator. The strategic potential of partnerships and sponsorships can be significant.

**Objective:** Explore opportunities for strategic partnerships that will bring value/revenue to BOMA Canada and its members. **Target a minimum number of partnerships/sponsorships** within the strategy timeline. Partnerships may speak to specific programming, such as education and training or could expand the reach of the organization (e.g. exploring a partnership with the Interior Designers of Canada to better integrate that industry’s activities with ours).

H. COLLABORATIVE INITIATIVES WITH LOCALS is an avenue for BOMA Canada to promote inclusiveness and cohesion with and among members. In this regard, BOMA Canada may continue to build trust and dialogue to underpin ongoing success.
Objective: The expansion of strategic partnerships may lend itself to collaborative initiatives with Locals, as has occurred already with BOMA BEST®, BOMEX® and other programs. Direct consultation between BOMA Canada’s leadership and the Locals’ leadership is also key, so BOMA Canada must **continue in-person visits with the Locals**, ideally on an annual basis. Additionally, these visits should be supplemented with BOMA Canada Chair’s calls. Moreover, Local leadership currently attends BOMEX® in an uneven manner. **Increased attendance at the national conference from all Local leadership groups would provide an outstanding opportunity for a “BOMA summit”** which, no doubt, would generate significant value to BOMA Canada and the Locals.

I. & J. The dual **strategic imperatives** of building an effective **NATIONAL MEMBERSHIP DATABASE** and developing a **FORUM FOR ISSUE IDENTIFICATION AND ACTION** provide high potential opportunities to advance national and regional cooperation and engagement. Creating a National Membership Database will **open up valuable data that will be critical to BOMA as a whole**. At present, BOMA does not really know who its underlying members are across Canada – for instance, which companies are growing their membership, which are shrinking. **Leveraging this data nationally is essential to serving the underlying membership most effectively at both the Local and National levels in everything from advocacy to BOMA BEST® participation.** Ultimately, it is key to preserving and enhancing BOMA’s core value across Canada through, among other things, creating a Forum for Issue Identification and Action and **enabling BOMA members across Canada to receive tailored messages** from BOMA Canada, just as they already do from their Local Associations and BOMA International so as to **reinforce BOMA’s programming** (e.g. through BOMEX® attendance).

**Objective:** Create a national membership database. Once created, **leverage the opportunities** that the database provides as discussed above.

(3) **Shared Practices Leadership**

As a national body, BOMA Canada is best positioned to oversee and administer shared best practices. Going beyond the establishment of communication protocols, it calls for BOMA Canada to develop mechanisms to capture ideas and approaches and disseminate them for optimal effect.

**K. PRODUCTIVITY TOOLS AND SERVICES** – Building owners and managers need to be increasingly productive. **BOMA Canada can add significant value when leveraging Thought Leadership, including importing ideas and approaches from inside and outside of Canada.**
**Objective:** In collaboration with Locals and the NAC, determine specific areas of attention, i.e. those expense items on members’ P&L statements where best practices or innovative approaches may have positive impact. Conduct internal research with Locals or external research through BOMA Canada to gather best practice information that may be applied specifically to priority items. Track best practice adoptions and benchmark performance.

L. **BENCHMARKING** is fundamental for improvement. With appropriate technology at its disposal, BOMA Canada may develop, over time, a sophisticated system to benchmark progress on metrics deemed important to members. The promotion of excellence and productivity and the celebration of achievement are tied to this commitment.

**Objective:** BOMA Canada already benchmarks via the Awards program and BOMA BEST®. With the new IT platform, BOMA BEST®’s capacity for benchmarking expands significantly and this opportunity should be seized. Down the road, BOMA Canada should consider if the IT currently under development for BOMA BEST® can be leveraged in other ways too and/or if there are additional ways to benchmark non-environmental metrics.

M. **STANDARDS AND CERTIFICATION** present a strategic opportunity for BOMA Canada to set the gold standard for performance in the sector and to establish significant institutional credibility. The NAC particularly appreciated BOMA Canada’s role in setting standards.

**Objective:** As with BOMA BEST®, BOMA Canada should develop a Gold Standard for the Building Operator Certificate Program. With the introduction of best practice projects and productivity enhancement tools and programs, BOMA Canada should constantly seek to establish similar standards, as it has done with BOMA BEST®.

***

**STRATEGY FOCUS**

While BOMA Canada’s strategic reach will be appropriately broad and deep, it is important to appreciate this plan’s clear focus on specific strategic imperatives. Pursuing all those imperatives at once will be impossible, however. The Board must triage the imperatives in light of competing priorities and resources. That said, the following strategic imperatives are particularly pressing and should be pursued early on in order to advance the broader strategy. Importantly, we recommend that they be priority areas for BOMA Canada during the initial 12 to 18 months of the
2015 strategy timeline, with the first item – BOMA BEST® - having paramount priority.

1. BOMA BEST®
2. National Membership Database
3. National Awards
4. Building Operator Certification Program
5. BOMEX®
6. A Forum for Issue Identification and Action

STRATEGY CORNERSTONES

Within its strategy of National Leadership, Thought Leadership and Best Practices Leadership discussed in this report, we recommend that BOMA Canada adopt a framework of strategy cornerstones. **These cornerstones should act as filters or lenses to discipline BOMA Canada by ensuring that all of its activities fall within the scope of its strategy.** If proposals for investment or action fit within the cornerstones, then they may be pursued in light of other criteria, such as relative importance, cost, risk, etc. However, should a proposed initiative not fall within these cornerstones, then it should, failing extraordinary circumstance, be abandoned.

We recommend the following cornerstones or strategic filters. Will a proposed initiative that can be associated with the strategic leadership directions:

- Align with BOMA Canada’s four pillars?
- Make BOMA more successful?
- Help building owners and managers become more productive?
- Promote excellence?

Any new initiative may not have to meet all four criteria. If, however, a proposed action is misaligned with one or more of the criteria, or if it contradicts the spirit of any one criterion, the organization needs to recognize that it may indeed be distracting from strategic purpose or even counterproductive.

A NOTE ON GOVERNANCE

Within the process of strategy development, the challenges and opportunities of BOMA Canada’s governance structure has been a focus of significant discussion and, frankly, rancor. In fact, the issue of governance became so divisive and
distracting that it risked the entire strategic enterprise and was deferred. Ignoring it for too long, however, will only make matters worse. **BOMA Canada has an issue with governance, as the mere discussion of it immediately becomes emotional and personal rather than rational and professional.** BOMA Canada should **undertake a formal governance review at the next reasonable opportunity.** The desire among some to revisit the Federation Agreements could be done as part of this process.

**CONCLUSION**

BOMA Canada has reached an inflection point. There is a real potential for the association to create synergies with its members not only to better define roles and accountabilities but to create shared value. Coming out of this process, **BOMA Canada’s leadership model should be unambiguous and unfettered,** encouraging progress and stimulating action while reflecting the ideas and practices of its members.

The directions and initiatives presented within this report represent a palette of strategic options. While all are worthy of consideration and implementation, **BOMA Canada will need to determine the number and order of its strategic priorities and accompanying objectives, focusing on BOMA BEST® first and foremost.** **With its current level of funding, BOMA Canada simply cannot undertake all of the initiatives discussed herein. It must be strategic and efficient in determining which to pursue now and which to pursue when circumstances are right, via the creation of an operational plan driven off this Strategic Report.** While doing nothing can occasionally be a valid approach within strategy, attempting to do everything at once will not be effective.