



AMERICAN INDIAN SCIENCE
AND ENGINEERING SOCIETY

Strategic Business Plan 2019–2023

Supporting Indigenous People in
STEM Education and Careers

Student Success
Career Support
Workforce Development



American Indian Science and Engineering Society
6899 Winchester Circle, Ste. 102A | Boulder, CO 80301
www.aises.org

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PLAN OVERVIEW

Background & Context for the Plan

In 2019, American Indian Science and Engineering Society (AISES), a 501(c)(3) public charity, embarked on a planning process to guide the organization in building its capacity and programming over the next four years. Following a successful leadership transition six years ago followed by significant growth and evolution of the work of the organization both in size and scope, the time was right to take stock of AISES and determine a next lifecycle stage course of action in service of its mission. This comprehensive process—conducted in partnership with outside consultants, interSector Partners, L3C—allowed for both internal reflection and outside perspectives to leverage the organization’s history and assets toward a sustainable future.

The Planning Process

The following outlines the planning process undertaken by AISES.

Q1 & Q2
2019

- Document review and discovery by consultants
- Hold kick-off meeting: designing the stakeholder input process, model/best practices resource, scheduling the process
- Hold core team retreat to develop preliminary ideas, concepts and models
- Meet with broader AISES staff to gather input into the process, build on S.W.O.T. analysis and explore vision for the future

Q3 2019

- Develop model research templates and stakeholder input protocol
- Conduct market research stakeholder survey and interviews, and model research
- Analyze research and input and develop reports
- Hold core team retreat to review proposed direction, discuss membership and areas to enhance, adjust or grow
- Draft strategic business plan

Q4 2019

- Meet with board of directors to review strategic business plan
- Make adjustments to the plan to reflect board input
- Receive final approval from the board of directors
- Create game plan for implementation check-ins with staff and board in 2020

Decision-Making Guidance

Decision making during the process was guided by a set of decision-making criteria. These criteria can also be used as new ideas and opportunities arise and will allow AISES to return to a set of questions that help it to decide – what is essential?

- Is the opportunity / strategy tied to the mission?
- Does it fit within the work we are trying to get done?
- Does it fit in our long-term / big picture plan?
- Can we secure the resources to deliver on this opportunity?
- Does this allow us to create a sustainability path vs. a cliff?
- Do we have or can we get the capacity to take this on?
- Will our stakeholders and other audiences support this?
- Does it consider our international members?
- Do most of our staff support this decision or direction?
- Does this support our culture of risk-taking and innovation?
- Are we keeping pace and leading with innovation in our field with this direction?
- Are we leveraging the equity/inclusion movement in this work?
- Is it aligned with hot topics in philanthropy (men & boys of color, women & girls, DEI)?
- Does it honor our history and traditions?
- Does it allow us to uphold our Indigenous values? (Together, Respect, Inspiration, Believe, Encourage)
- Will we be able to take the time to celebrate it?

The Plan

The following plan outlines a long-term vision and four-year plan for how AISES will evolve toward achieving the vision. A combination of strategic and business plan, the document explains the process used to develop the plan, as well as details how the organization will adapt its business model to meet changing market needs and continue to offer high quality services to its members, partners and other supporters.

ABOUT AISES

Founded in 1977, with a rapidly expanding membership of more than 4,600 individual members, AISES works with students, professionals and educators through 190 chartered college and university chapters, 20 professional chapters, Four Tribal Chapters, and 158 affiliated K-12 schools supporting Indigenous students and professionals in the critically-needed disciplines of science, technology, engineering, and math (STEM). AISES is a 501(c)(3) public charity that, while not a traditional professional society or member association, activates a membership of students, professionals, and partners in support of its programmatic mission.

AISES administers many programs, services, and events for pre-college, undergraduate, and graduate students designed to increase their access to college and support their success in in preparation for careers in STEM fields. Indigenous college students need professional mentorship and peer support in addition to scholarship support. Students are most successful when they have a network of other Indigenous students, as well as professionals who can provide ongoing support while they are pursuing undergraduate and graduate studies. AISES provides exactly this critically needed support through its programming.

AISES is dedicated to supporting early, mid, and executive professionals in STEM fields through professional development, career opportunities, networking, and research support to mentors who support professionals in STEM. AISES' support does not end once a student graduates from college and enters a STEM career, but rather provides ongoing career and professional development programming to help Indigenous STEM professionals grow and succeed in their chosen career fields. Additionally, AISES offers a multitude of opportunities for professionals to “give back” through mentoring and supporting Indigenous STEM students.

AISES has awarded over \$12 million in academic scholarships to Indigenous STEM students while also providing internships, workforce development and career resources, national and regional conferences, science fairs, leadership development, and other STEM focused programming.



THE AISES FRAMEWORK

Vision

The vision of AISES is for the next seven generations of Indigenous people to be successful, respected, influential, and contributing members of our vast and ever-changing global community.

Mission

AISES is a national, nonprofit organization focused on substantially increasing the representation of American Indians, Alaska Natives, Native Hawaiians, Pacific Islanders, First Nations and other indigenous peoples of North America in science, technology, engineering and math (STEM) studies and careers.

Values

AISES is committed to the following core values.

Knowledge	Innovation	Relationships	Integrity	Empowerment	Culture
We are committed to the pursuit of knowledge and continuous growth in learning and teaching	We anticipate and embrace change and strive to learn and improve by trying new approaches and forward-thinking solutions	We actively build and continually steward transparent, honest, and ethical relationships with our partners, members and all others who are part of our AISES family	We do what we say we are going to do and conduct our business with the highest standards of professional behavior	We embrace the power of our people by encouraging them to take initiative, lead and make decisions	We honor our ancestors by carrying forward our cultural traditions and values in all that we do

AISES Strengths, Competencies and Assets

AISES's strengths, competencies and assets are many and were identified throughout the process by consultants, key external stakeholders, board and staff members. These strengths should be leveraged by AISES going forward to capitalize on its impressive 40+-year track record and build toward the future.



Committed, motivated and professional staff



Supportive, responsive and diverse board of directors



Variety and quality of programs



Quality events, especially the national conference



Communications with members via publications, outreach and website



Strong and active membership



Long-term, committed partners



Reputation for achieving the mission

AISES Life Cycle Stage

While AISES exhibits characteristics of several nonprofit life cycle stages, and various aspects of its work fall into various stages, AISES most neatly falls under the growth moving into maturity nonprofit stages. It is not uncommon for an organization with a long history to return to find itself in a growth stage (or even startup!) as it reboots for the next phase of impact.

THE GROWTH STAGE: INFRASTRUCTURE DEVELOPMENT

	Characteristics	Challenges
Program	Defining distinctive methods and approaches; taking hold in the marketplace	Identifying distinctive competence
Management	See infinite potential; get pulled into larger-scale community projects	Too much to do, too little time; managing staffing needs
Governance	Board structure appears, board development evolves	Developing board ownership
Resources	More sources of income, greater accounting complexities; lack of time, sense of burnout, start hiring specialists	Diversifying revenue
Systems	More sophisticated tracking is needed	Managing cash flow; formalizing org. structure

THE MATURITY STAGE: COMMUNITY IMPACT

	Characteristics	Challenges
Program	Well-organized, results-focused, in-touch with community	Remaining client-centered; not policy-bound; maintaining relevancy
Management	Executive is a leader among peers, engaged in public policy work, 2 nd or 3 rd generation	Becoming position rather than person-dependent; keeping staff motivated around mission
Governance	Focus on policy, set direction, leave mgt. to ED, prestigious "movers and shakers," access to wealth	
Resources	Diversified, financial flexibility, more ability to forecast; staff is seasoned, good at delegating	Building financial footing (endowments, reserves)
Systems	High level, annual reports, known course of action for financials and programs	

(Source: Compiled, refined and edited by interSector Partners, L3C, based on the works of Susan Kenny Stevens, Karl Mathaisen, III and TCC Group)

As examples of where AISES exhibits some characteristics of a mature stage nonprofit, consider its strong governance structure and team and its chief executive as a leader among her peers. Growth stage characteristics include such aspects as refining programs to best meet market needs, the need for more sophisticated tracking (underway), and diversifying revenue (also in process). The challenges present in each stage—and in the transition between stage—help to illuminate organizational tensions that lead to the need for a strategic business plan.



AISES 2020—2023

Vision for the Planning Period

In the coming four years, AISES will build on successes of the last 40 years and leverage its many strengths and assets to solidify its position and programs, while growing its membership, infrastructure, and funding to increase its mission impact. Rather than a plan that adds programs or initiatives for the sake of “new,” during this planning period, the focus will be on enhancing quality AISES offerings to best serve members and partners, as well as building out the infrastructure needed to support this quality programming.



Planning and Implementation Calendar

In support of this vision, AISES developed foundational strategic imperatives that arose through the planning process, as well as four-year goals and objectives. The strategic plan was built with the following timeframe in mind.

Planning Year	Calendar Year	Approach / Planning Activities
One	2019	Developing the Strategic Plan framework
Two	2020	Developing the implementation framework for the Strategic Plan Beginning implementation
Three	2021	Implementing the Plan Revisiting objectives for continued relevancy
Four	2022	Implementing the Plan
Five	2023	Implementing the Plan Beginning the next strategic planning process

Strategic Imperatives

To guide AISES toward its vision for the strategic plan, several strategic imperatives will be integrated into the plan and AISES’s work going forward. Strategic imperatives are those items that are so foundational to the plan and achieving the vision for the plan that they serve as a foundation—or umbrella—for the planning cycle.



A strong membership amplifies our voice and power

The AISES community is comprised of a diverse and broad group of stakeholders. In holding space for people ranging from young Indigenous students to Elders and emerging STEM professionals to Fortune 50 executives, AISES has created a community that will speak on behalf of the issues it seeks to address through its mission.

The AISES membership focuses on giving back to the AISES community as ambassadors, providing technical expertise, mentoring and bringing others into the fold.

Asking AISES members their perspectives, ideas and opinions builds connections with our members while giving us critical information about how we can better serve them.



A North America-focus expands our reach and impact

AISES recognizes the need for its programs and services expand beyond the United States. By embracing a North America focus serving Indigenous people and communities, as well as universities and businesses in Canada, AISES delivers on its mission across geographical boundaries for greater mission impact.



Cross-stakeholder connections strengthen our work

AISES stakeholders express a strong desire for opportunities to interact with each other. They and the organization benefit when these connections are intentionally fostered and nurtured.



Systems-level change is critical to achieving our vision

Programs and services offered by AISES create important pathways for those we serve and are the lifeblood of our work. In order to “work us out of a job,” however, AISES must also focus on the long game by addressing the systems that lead to the lack of representation and opportunities for Indigenous people in STEM studies and careers.

Strategic Plan Goals

Capitalizing on its assets and core competencies and taking into account its life cycle stage transition, over the next four years, AISES will focus on the following goals in support of its vision for the planning period:



Grow the size and strength of the AISES membership



Develop a formalized mentorship program leveraging the strengths of the AISES community



Increase the diversity and amount of financial support to create a more sustainable funding model



Engage in advocacy and policy work in support of the AISES mission



Build out the information technology infrastructure and systems to support our work

Goals, Objectives & Rationale

The following section outlines the objectives for each goal, as well as the rationale for the goal and objectives as a result of stakeholder input, model research and other analysis conducted during the planning process. Comprehensive action plans will be developed for each goal in and its associated objectives in 2020, and objectives and associated action plans will be revisited halfway through the planning period and be updated based on progress and the current AISES environment.

Grow the size and strength of the AISES membership



Objectives in support of this goal

Target Completion Date: December 31, 2019

- Eliminate membership dues for students and chapters

Target Completion Date: December 31, 2020

- Develop and implement a more structured package for chapters designed to enhance their capacities and commitment, and grow numbers of student members
- Redefine (messaging) professional individual membership
- Enhance membership resources for pre-college and college members (individuals and chapters)
- Restructure outreach to and management of college chapters to increase the number of (active) chapters
- Examine and select appropriate legal structure for managing the growing professional chapter network to reduce administrative and fiduciary responsibilities of AISES headquarters
- Secure funding to hire a membership outreach staff position

Target Completion Date: December 31, 2022

- Building on the mentorship and advocacy goals grow the professional membership by 10%
- Building on enhanced membership of pre-college affiliates, grow the college (active) chapters and individual members by 10%

Big questions and board direction related to this goal area

Two primary big questions related to this goal area arose during the planning process and were explored and addressed through research and input:

- ✓ Given that AISES is not a membership organization or a professional society, but rather is a 501(c)(3) public charity, what is the role of members to the organization?
- ✓ Membership dues generate very little revenue for AISES, is charging for membership the right model?
- ✓ How can AISES grow its membership to better represent the size and scope of the work that it does on behalf STEM students, professionals, and employers?
- ✓ What is the right role of corporate members/partners; how can AISES structure corporate membership to create ROI for both AISES and corporate members?
- ✓ How do we strengthen and increase our college chapters and members given they are the primary focus of our funders?
- ✓ How do we articulate to professional members that the value-add to their membership is “giving back” to AISES the students so they shift their mindset from “what do I get from AISES” to “what can I give back to AISES” now that I am a professional?

Process research and input in support of these big questions and the goal area

During the stakeholder input process and model research phase of the planning process, data and information were gathered that provided guidance on the above big questions and helped to set the board’s direction for this goal area:

- AISES’s product is people/membership; create more opportunities for people to engage with AISES
- Redefine membership as someone who has engaged with or supported the organization in some way
- If dropping membership dues, must determine how to capture member information (role, age, position, etc.)
- Expand memberships and partnerships to other Indigenous organizations around the world
- Grow the professional membership; bring professionals back in to see the value of AISES
- AISES must speed up its corporate engagement; partner with more corporations
- Create more opportunities for corporate members to access talent; with access corporate member retention will be higher
- Organizations researched have models like AISES, but with more robust corporate affiliate partners and sponsorship opportunities

Develop a formalized mentorship program leveraging the strengths of the AISES community



Objectives in support of this goal

Target Completion Date: March 31, 2020

- Research mentorship program models to understand best and promising practices and what investment is necessary to make this program work

Target Completion Date: August 31, 2020

- Develop a model for a peer-to-peer mentorship program for students

Target Completion Date: December 31, 2020

- Create materials, training, and processes to roll-out the peer-to-peer mentoring program to AISES chapters
- Launch model for a professional-to-student mentorship program for students

Target Completion Date: March 31, 2022

- Evaluate the student peer-to-peer and professional-to-student new mentorship programs and plan

Target Completion Date: June 30, 2022

- Explore the value of and interest of a professional-to-professional mentorship program

Big questions and board direction related to this goal area

Two primary big questions related to this goal area arose during the planning process and were explored and addressed by the board of directors:

- ✓ How can STEM professionals become more engaged in the work of AISES: what can AISES offer them and how can they give back?
- ✓ What opportunities are there to formally connect STEM and STEM-curious students with STEM professionals for learning and support?

Process research and input in support of these big questions and the goal area

During the stakeholder input process and model research phase of the planning process, data and information were gathered that provided guidance on the above big questions and helped to set the board's direction for this goal area:

- Opportunities to engage professional members in the organization was highly desired by key stakeholders. A mentor program was mentioned as a way to retain professional members.
- Desire to tie the chapters to AISES professional members in their area
- Mentorship programs can be very successful; remain mindful of the number of things that Indigenous people are asked to do as Indigenous community members
- Organizations researched have successful mentor programs (see model research attachment for more info); for instance, Society for Women Engineers has five staff in its mentorship program

Increase the diversity and amount of financial support to create a more sustainable funding model



Objectives in support of this goal

Target Completion Date: June 30, 2020

- Develop plan for planned giving, major donors, and monthly giving

Target Completion Date: August 31, 2020

- Launch plan for planned giving, major donors, and monthly giving

Target Completion Date: December 31, 2020

- Develop an in-kind sponsorship program to leverage assets corporate partners can bring to AISES
- Develop a plan to initiate a two-year capital campaign to create an operational endowment
- Create a plan to integrate Sequoyah Fellows and their sponsors into individual giving strategy 25%
- Examine models for paid corporate membership program (separate from sponsorship opportunities) to determine feasibility

Big questions and board direction related to this goal area

The big question related to this goal from the planning process was:

- ✓ How can AISES get off the “fundraising treadmill” and create a more sustainable model for the future?
- ✓ What role can corporations, foundations, and businesses play in creating a more sustainable base of annual support?

Process research and input in support of these big questions and the goal area

During the stakeholder input process and model research phase of the planning process, data and information were gathered that provided guidance on the above big questions and helped to set the board's direction for this goal area:

- Always ask ourselves, “Does this ensure longevity?”
- AISES is both an organization and a network. The organization operates programs and has a more conventional bottom line while the network is decentralized and is more open-ended. Need to focus on how to maintain sustainability of the network.
- Create a sustainable organization via responsible growth
- Three of four organizations researched for best and promising practices have relatively diverse sources of revenue
- AISES has relatively diverse revenue, but could enhance its diversity
- In-kind needs include event space, hardware (AV, laptops, printers, video cameras), travel, program equipment (robotics, school supplies, Legos)

Engage in advocacy and policy work in support of the AISES mission



Objectives in support of this goal

Target Completion Date: June 30, 2020

- Seat an advocacy advisory council to advise and support advocacy efforts

Target Completion Date: December 31, 2020

- Develop an advocacy program structure and plan
- Create an annual advocacy agenda beginning with 2021 agenda

Target Completion Date: December 31, 2021

- Implement an advocacy activation process for informing AISES members, partners, and donors about opportunities to engage in policy that impacts AISES, its members and its mission

Target Completion Date: December 31, 2022

- Hire a Washington, DC based staff person or consultant to represent AISES at important events/convenings on The Hill and to work with other agencies and organizations located in DC

ig questions and board direction related to this goal area

The big questions related to this goal from the planning process were:

- ✓ What role can AISES play in changing the systems and policies that have kept isolated from STEM opportunities?
- ✓ What role can AISES play in supporting policies and legislation that allows our students, professional members and partners to be successful?

Process research and input in support of the goal area

During the stakeholder input process and model research phase of the planning process, data and information were gathered that provided guidance on board's direction for this goal area:

Desire to think of longer-term, broader scale approaches to making change and increasing the overall number of professionals in the field

- Direct service is important, and policy / advocacy work can address the underlying systems that lead to the need for services

If AISES were to become too insular, it would lead to people backing away

- Could do better with engaging with relevant issues impacting Indian Country
- researched have strong advocacy programs that include public policy special interest groups, and policy priorities and / or initiatives outlined for each year

Build out the information technology infrastructure and systems to support our work



Objectives in support of this goal

Target Completion Date: June 30, 2020

- Conduct a data audit to understand what types of data we'd like to have

Target Completion Date:

- Determine how to best use internal AISES communications for data mining and implement CRM / AI changes to support data gathering

- Raise funds (or in-kind support) for and purchase computers, printers, etc. needed by the AISES staff to fulfill their duties and create a technology replacement fund to allow for upgrades as needed
- Determine how to integrate other data such as chapter reports, online forms, etc. into existing systems

Target Completion Date: December 31, 2021

- Create a plan for what's needed in a custom centralized system and what that would cost

Target Completion Date: December 31, 2022

- Streamline and consolidate information technology that AISES currently has (e.g. get the databases to talk to each other)

Big questions and board direction related to this goal area

The big questions related to this goal from the planning process were:

- ✓ What will it take for AISES to be cutting-edge in terms of its technology interface?
- ✓ How can we make sure that AISES staff has the tools it needs to achieve the mission?
- ✓ What does the dream centralized system look like? What will it take to get there?

Process research and input in support of these big questions and the goal area

During the stakeholder input process and model research phase of the planning process, data and information were gathered that provided guidance on the above big questions and helped to set the board's direction for this goal area:

- Become more data-driven by capturing and analyzing our own data
- Indigenize technology: for AISES and then for the broader nonprofit world
- It appears that other organizations researched have similar externally facing IT (YourMembership job board, conference registration systems, etc.)

STRUCTURE IN SUPPORT OF THE PLAN

AISES will reorganize the way that it communicates about its programs, research/data efforts, and advocacy/policy work in order to simplify its messaging and the understanding of its work by external audiences.



Student Success



Career Support



Workforce Development



Governance

AISES has a strong governance structure that includes a diverse board of directors and a set of advisory councils that help directors stay in touch with various areas of work pertinent to the AISES mission. Councils include academic advisory councils, corporate advisory council, government relations council, professional development council, Canadian Indigenous advisory council, Tribal Nations advisory council, and the Council of Elders. In addition, the board has committees that support AISES' work. Board committees include education, finance, governance, membership, nominations, and professional development. The structure offers a comprehensive approach to providing opportunity for multiple stakeholder voices to be involved in the leadership structure of AISES.

Advocacy Committee

For purposes of advancing this plan, an ad hoc committee will be convened to set the course and boundaries for advocacy efforts on behalf of AISES. During the three-year plan period, an advocacy/policy committee will be added to deliver on the direction set by the ad hoc group.

Reporting to the board of directors, highlights of this committee will include:

- Collaborating with committees, chapters, special interest groups and membership
- Working closely with board and staff liaisons and advising on key public policy issues at the state and federal level that affect those served by AISES
- Setting an annual advocacy agenda in service of AISES members, partners and mission
- Working with any contractors brought on board to support advocacy and policy efforts

Staffing

As AISES moves from its growth life cycle stage into a mature stage organization, it will reorganize its staff structure to meet the organization's needs and support the strategic business plan. A mature stage structure will allow the AISES CEO to focus on outside relationships, serving as an ambassador for AISES and building high-level partnerships. This structure will create clear lines of succession that are a critical part of sustainability, as well as enhancing retention through an equitable and clear structure that demonstrates opportunities for advancement.

The mature stage structure will also include an executive team that will work in support of the main functions at AISES. Executive team members will include the CEO, Deputy Director, Chief Finance Officer, Chief Program Officer, and Chief Development Officer.



American Indian Science and Engineering Society 4263
4263 Montgomery Blvd NE Suite 200
Albuquerque, NM 87109
www.aises.org