



STRATEGIC PLANNING COMMITTEE REPORT - JUNE 1, 2022

After being formed earlier in the year, our Strategic Planning Committee has been searching for possible outside consultants to facilitate and guide the IAM through a meaningful, efficient and practical process. We have reached out to several firms, received a handful of proposals, and hope to be able to make a recommendation to the Board before too long. Of these proposals, two are in the range of \$55K-60K (beyond the intended pricing). We received another proposal in the range of \$18,500 (recommended by MCC, and based in Dallas), and will be interviewing this consultant shortly after Montreal to get a sense of fit to work with us as an international non-profit mediation organization.

For your information, attached is IAM's initial scope of work for this endeavor as prepared by our committee, which will naturally be adjusted based on recommendations from the selected consultant to maintain a practical and useful outcome. In summary, here is what we presently look to accomplish/goals:

- Review and modify/affirm the IAM's mission, core values and vision.
 - A review of the IAM's optimal membership size and growth;
 - Address how we offer the highest value and relevance to our membership on an individual level, regionally, and to the collective IAM membership;
 - Explore to what extent the IAM is internally focused primarily for the benefit of our member's commercial mediation practices and academic/training positions, or also to provide resources externally to the community at large (e.g., pro bono, trainings, civil discourse, etc.);
 - Review and create action items/best practices for diversity, equity, and inclusion;
 - Explore annual in-person regional retreats in addition to the annual in-person conferences, whether to form regional chapters; and
 - Review social media/outreach and allocation of IAM resources (in conjunction with our other existing committee work).

Steve Paul (Chair)
Orit Asnin
Chuck Doran
Jonathan Lloyd-Jones
Joyce Mitchell
Jerry Weiss



International Academy of Mediators

Criteria and background information for Strategic Planning Consultant

The International Academy of Mediators (IAM) is seeking a consultant to assist the IAM Board of Governors/Strategic Planning Committee in conducting a strategic planning process. We seek an experienced, facilitative consultant who can align and work closely with the IAM team to formulate and engage in an efficient and comprehensive process that produces a workable final report and roadmap for the short term and long-term future leadership (including other items as listed below). The last strategic planning endeavor was approximately 8 years ago, which resulted in an increased effort to add international membership.

About the IAM:

The IAM was founded in 1996 as an invitation only organization to provide a forum for commercial mediators who meet IAM's standards and experience requirements to discuss best practices, adhere to the highest practice and ethical qualifications, grow as mediators, and support each other personally and professionally. Apart from Covid, members are scheduled to meet in-person once a year at IAM's conferences (with another annual virtual conference), participate in and conduct webinars and other programming, mentor the next generation of mediators, and exchange ideas and techniques through a member-only Listserv. The IAM has grown to over 200 Distinguished Fellows, with members from North America and many other nations.

Please thoroughly review the IAM's website (<https://iamed.org>) for further description and listing of its membership, and as we get under way, we will provide access to the Member Portal that contains IAM policies, governance, our history, mission/statement of values, bylaws, and other background information. We will also provide the results of a comprehensive member survey and summary (2019).

What we look to accomplish/goals:

- Review and modify/affirm the IAM's mission, core values and vision;
- Work with a consultant to define and complete a manageable agenda that could include:
 - A review of the IAM's optimal membership size and growth;
 - Address how we offer the highest value and relevance to our membership on an individual level, regionally, and to the collective IAM membership;
 - Explore to what extent the IAM is internally focused primarily for the benefit of our member's commercial mediation practices and academic/training positions, or also to provide resources externally to the community at large (e.g., pro bono, trainings, civil discourse, etc.);
 - Review and create action items/best practices for diversity, equity, and inclusion;
 - Explore annual in-person regional retreats in addition to the annual in-person conferences, whether to form regional chapters
 - Review social media/outreach; and

- Allocation of IAM resources

We anticipate that this list will be adjusted, expanded, or limited during our review with the strategic planning consultant.

Timeline/Process:

- Once the strategic planning consultant is selected, we will develop a timeline with benchmarks and deliverables, with the aim of a final report within 9-12 months of initiating the process;
- With the assistance of the strategic planning consultant, develop a process that can include participation by the IAM Board of Governors, past leadership, member interviews, a possible virtual or in-person retreat, and other input as recommended.

Please answer the following:

- What is your optimal timeline and benchmarks?
- What is your process for gathering all the information necessary to most understand the IAM and its aim as part of this process?
- What is the deliverable at the conclusion of this strategic planning process and how do you define success?
- Describe the best reasons for selecting you for the IAM strategic planning process, including how you would tailor your approach unique to the IAM.
- Confirm that you will be available (time to be determined) for an in-person interview and/or an initial in-person and other meetings during the strategic planning process, possibly May 31-June 1 in Montreal.

Responses should also include:

- 2-3 references, preferred but not essential from dispute resolution organizations or related (e.g., national and international non-profit organizations, ADR membership associations and firms, etc.)
- About your firm/bio of the dedicated consultant that will work on the project
- Proposal of fees and billing procedures

IF INTERESTED IN BEING CONSIDERED FOR THIS OPPORTUNITY, PLEASE SUBMIT YOUR RESPONSE TO IAM EXECUTIVE DIRECTOR RICHARD REJINO (richard@iamed.org) BY NO LATER THAN MARCH 25, 2022.