

# Restructuring a Construction Management Industry Advisory Board – A Case Study

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The need for and benefits of an actively engaged Industry Advisory Board (IAB) have been well established in the literature associated with construction management and similar degree programs. Accreditation standards require the establishment of such a board. More recently, studies of best practices associated with board operations have been published. Using a case study methodology, this paper reviews the process by which one such IAB completely restructured itself to incorporate these best practices and to better serve its associated degree program. The common themes resulting from a review of IAB by-laws from other institutions and the outcomes of a formal benchmarking study are presented. The results of the restructuring process as outlined in the new by-laws addressing each of these common themes and creating a new IAB better positioned to impact the degree program are described. This case study represents just one alternative to assess the performance of an IAB and to restructure as needed to achieve better results.

**Key Words:** Industry Advisory Board, Academic/Industry Partnerships, Benchmarking.

## Introduction

Nearly all postsecondary curricula in Construction Management in the US have established an Industry Advisory Board (IAB) to help review the curricular content, to insure currency in course content, to strengthen the connections between students and industry representatives, to help with the recruitment and placement of graduates and interns, to provide financial support, and to help support the program as needed (Emmer & Ghanem, 2013, Burt, et.al., 2006, and others). In fact, the American Council for Construction Education (ACCE) – the national accrediting body for Construction Management (CM) and similarly named degree programs has, almost from its founding in 1974, required the formation of an IAB for programs seeking accreditation. That IAB must be demonstrated to be active and supportive of the program in order to maintain the program's accreditation. The recently approved, current ACCE Standard reads as follows (ACCE, Document 103, 2014):

### 8.2.1 Support from Industry

An advisory committee with representation from the construction industry shall be utilized to periodically review the degree program curriculum and advise the educational unit on the establishment, review, and revision of its degree program educational objectives.

8.2.1.1 The composition of the committee shall be representative of the potential employers of the graduates of the degree program and other industry professionals.

8.2.1.2 The committee shall meet at least once a year for the purpose of advising and assisting the development and enhancement of the degree program.

8.2.1.3 Minutes of such meetings shall be kept on record.

While this Standard establishes the minimum requirements for an IAB at an ACCE accredited CM program, the studies reviewed in the next section have documented considerable variation in the size, membership, contributions, structure, and effectiveness of these Boards. But the literature showed a limited record of a program purposefully going through a process of changing its existing IAB's structure and operating procedures to insure its sustainability, to improve its function, and to expand the potential impact on the program. (See Badger, 1999, for one instructive

history of the development of a impactful IAB at a major CM program.) While, no doubt, other examples of this transformation exist, the purpose of this study was to review the case of just one program's attempt to restructure its IAB from an informal group offering advice to a highly effective contributor to the success of the program.

### *Literature Review*

Much of the literature related to IABs is based on surveys and structured interviews of both program directors and IAB members. Hynds and Smith (2001) was an early example of such a study presenting data from structured interviews of the leaders of 13 accredited CM programs. They built on earlier work (Tener, 1996, and Badger, 1999) describing the important role that an effective partnership with industry could play in the growth and development of a CM program. The 2001 interview data reveal a considerable variation in the use of formal by-laws (about half of the respondents), the size (from six to 80 members), membership terms (from two years to no term limits), the subcommittee structure (up to 12), the requirement for membership dues, the length of meetings, and the utilization of the IAB as a student recruiting tool. Not surprisingly, given this variability of data, the authors conclude that there was a large variation in the effectiveness of IABs at that time: "Most respondents implied that there was less than a sincere partnership between the programs of construction higher education and the construction industry." (Hynds & Smith, 2001, 244) While documenting the success of a few IABs, the majority of performance in this area was reported as perfunctory.

Similarly, Burt, et.al. (2006) completed the analysis of online survey responses from 36 accredited programs. The survey data from a wide range of programs – ranging in size from 15 students to 722 – also showed the variability of IAB structure, committee names, membership categories, administrative structure, and roles of the advisory board. Interestingly, the survey asked for the most valuable contributions of the IAB and for the most difficult aspects of managing this group. The most often cited contributions included guidance, curriculum, fundraising, and placement. The most often cited challenges included scheduling, follow through, "academia vs. industry", focus, and leadership. These results had earlier been presented to a meeting of ACCE program leaders generating a helpful list of IAB activities presented in an appendix to this publication.

Emmer and Ghanem (2013) presented the results of an online survey distributed to both program leaders as well as practitioner members of their advisory boards, thus allowing for some cross-survey comparisons of the two respondent groups. In addition to demographic data revealing the expected variability in program size and IAB names, membership types, and structure, the survey also asked for Likert scale responses to questions related to effectiveness and influence of the board on the academic program as well as qualitative questions related to the perceived role and primary contributions of the board. The authors concluded with an initial list of "best practices" for effective IAB operations and encouraged ongoing collaboration with practitioners to "provide a forum to bring practicing industry professionals together to start the process of developing best practices for IAB members and how they interact with their respective programs." (Emmer & Ghanem, 2013, 8)

While all of these studies were focused specifically on CM degree programs, similar survey data were reported by Genheimer and Shehab (2009) who looked at IAB operations and effectiveness at all colleges of engineering. They studied the impact of a large number of factors including the institutional culture, values, and priorities.

Current publications in this area are focusing on these best practices and self-assessment for non-profit boards of all types (Dignam & Tenuta, 2015) and for CM related IABs in particular (McIntyre, et.al., 2012 and McIntyre, 2014). Fundamental to this research is the development of self-assessment tools which can be used to benchmark the effectiveness of IABs. In their varying forms, these benchmarking tools allow a board to assess their own effectiveness relative to a series of "best practice" statements related to operating procedures, program and curricular involvement, industry awareness and recognition, and funding mechanisms and deliverables. An example of this type of benchmarking study is presented below. These studies are now aimed not just at reporting the variability and goals of CM advisory boards, but rather at assessing and improving their impact on the associated academic program (McIntyre & Fox, 2015). In line with the current ACCE outcomes-based Standards for all aspects of a CM program, IABs increasingly will be asked to report on their success at helping the program achieve its desired outcomes, not just reporting on the fact that they exist. This focus on outcomes will, no doubt, have an increasing number of CM degree programs looking at the structure of their IABs and asking if a reorganization of the board will help achieve these outcomes more effectively.

## Method

The purpose of this case study was to describe the process by which an established IAB at California Polytechnic State University (Cal Poly) set out to create a completely new structure for its board. Also presented is a summary of the results of that process focused on the new organizational structure and its by-laws, membership categories, administration, and funding. While any case study is essentially a single data point relevant to the circumstances and environment of just one setting, the process and analysis leading to these results might prove to be instructive to other institutions contemplating the need to make similar changes.

This case study research started with a review of literature (summarized above) and a review of the by-laws for 15 IABs associated with CM programs from across the country (e.g., Texas A&M, Clemson, Auburn, Wentworth, University of Florida, Arizona State University, Louisiana State, and others). From these reviews, a list of common themes and best practices for the most effective boards was developed. The ones considered most relevant to this campus established a series of goals for the new IAB structure. Parallel to this effort, a benchmarking study of the performance of the existing Industry Advisory Committee at Cal Poly was conducted by committee members to help determine the need for restructuring and critical areas to be addressed. The analysis of these common themes and the benchmarking study led to a decision in 2014 to disband the former Industry Advisory Committee and create in its place a new Construction Management Advisory Council (CMAC) operating under new leadership, by-laws, and administrative structure. The details of this new structure are described in the Results section below.

### *Common Themes*

From the literature review and, especially, the review of IAB by-laws from other degree programs, a list of common themes judged to be most helpful and relevant to the culture and environment at Cal Poly was developed:

- The successful IABs at some of the most established CM programs in the country were all self-governing at least to some extent. The change in culture was from department-led advisory groups to industry-led boards. Meetings were not called by the academic program leader; the board decided the meeting schedule and invited program representatives to participate. Officers were elected by the membership of the board. The level of self-governing structures varied, including some boards which functioned as an external 501.c.3 non-profit organization. Most university policies restricted or prevented this type of external board, but a high degree of self-governance was considered to be a best practice.
- The most successful IABs also expanded the reach of the academic program beyond just the board itself to include broader alumni and industry outreach. Under these structures, a larger organization was created to serve almost as an alumni association for the CM department. Some university Alumni Associations even allowed department specific alumni chapters – when this was possible, the affiliation with the larger association was part of the structure of the IAB. When an open membership policy allowed the board to grow in membership to include a large group of alumni and other supporters, a board of directors or an executive committee had to be created to enable a smaller group of more active advisors to effectively work with the degree program.
- Successful IABs created a series of membership categories recognizing the varying contributions that might be made from individuals, corporations, associations, alumni, and retired practitioners and educators. With each membership category, an appropriate set of membership benefits and responsibilities had to be determined. There was considerable evidence of an effort to balance the need for the input and energy of younger alumni with the need to honor the representatives of major donors and supporters of the program.
- Many of the most successful IABs found that there were considerable benefits from having paid staff positions focusing on IAB activities and departmental external relations. In some cases, these positions were paid for with line item funding from departmental budgets, but more often, these staff salaries were covered at least in part by the activities of the IAB itself. Regardless of the source of funding, moving away from a reliance on busy volunteers and faculty members providing administrative support to the board and replacing that with the efforts of dedicated staff was considered another best practice.
- In order to fund these paid staff positions as well as other initiatives of the IAB, consideration had to be given to developing revenue streams from membership fees, job fairs and other recruiting efforts, seminars and training, participation in research studies, donations to scholarships, and other alternatives. In some

cases, participation on the advisory board or executive committees was limited only to those individuals or entities paying annual fees, but frequently that need ran counter to the central goal of getting input from a wide spectrum of the industry. The need to generate these revenue streams, while at the same time insuring the broadest levels of input to the degree program, probably contributes to more variability in IAB structures than any other variable.

In the restructuring of the advisory committee into the CMAC at Cal Poly, efforts were made to address each of these common themes. Considerable discussions with all members of the committee and other supporters of the department took place over two years in order to get the structure right.

### *Benchmarking*

The former Industry Advisory Committee at Cal Poly completed an early version of the ACCE IAB Benchmarking assessment (for the latest edition, see ACCE, 2015) in order to compare itself against an external set of best practices. Prior to the assessment exercise, the committee expressed confidence that they were functioning very well as an advisory group – far better than most other entities of its type. Without the results of the assessment, they rated themselves very highly. After completing the benchmarking tool, however, members started to realize that there were other initiatives and opportunities for constructive input that IABs were demonstrating at other campuses. These were considered missed opportunities for Cal Poly. The results of this exercise are presented in Appendix A.

This benchmarking tool looks at best practices in four categories: Operating Procedures, Program and Curricular Involvement, Industry Awareness and Recognition, and Funding Mechanisms and Deliverables. There are several versions of this tool developed by McIntyre (2012, 2014, and 2015) and posted on the ACCE website (ACCE, 2015) that can be customized to the needs of any IAB. As an internal review document, it served as a good conversation starter for the former advisory committee at Cal Poly to determine a revised operating structure. As shown in Appendix A, the committee concluded after the assessment that there was room for improvement. Average rating scores ranged from 2.09 to 2.70. In other words, they graded themselves as a C to a B-; average at best.

In the area of Operating Procedures, the committee scored themselves well on the value of the meetings, but not as well on the by-laws (actually, there were none), posting activities to a website, and participation in ACCE. Under Program and Curricular Involvement, the respondents noted the good support for providing field trips and projects for classes as well as support for student organizations, but because of the remote location of the campus, they did not serve as adjuncts or on faculty searches. In the next category, the committee rightly took note of their active involvement in recruiting and hiring students for permanent employment or internships, but also noted the missed opportunities for IAB recognition through award programs and publications. It was the last category of Funding Mechanisms and Deliverables that was rated the lowest. The lack of sustainable revenue streams reduced options for committee initiatives and limited their role to an ad hoc advisory group. The decision to restructure was made. Initially, there was some dissension among some of the long time members of this group. They questioned the need for change and worried about creating a “pay to play” culture. Other committee members, while cognizant of these concerns, were satisfied with proposed membership categories that recognized the founders of this group.

## **Results**

To clearly mark the change in structure, the original Industry Advisory Committee formally disbanded itself in September 2014 and was replaced by the CMAC. The previous committee had never operated under a set of by-laws, only a “charge to the committee” that had been provided ten years earlier. CMAC adopted a new set of by-laws describing the revised structure for the Council. (See <http://www.construction.calpoly.edu/content/cmac/index> for the CMAC website and link to the by-laws.) As described in the sections below, the structure tried to address each of the common themes noted earlier as well as the shortcomings identified in the benchmarking exercise. It also tried to address the concerns that had been expressed by some of the members of the original Committee.

### *Self-Governing Structure*

Article 3 of the by-laws states that, “The business and affairs of the CMAC shall be conducted and guided by the members of the Council.” In support of that self-governing structure, the by-laws established committees reporting

to a Board of Directors responsible for formulating policy and advising on budget expenditures. The Standing Committees included: Executive, Membership Growth, Curriculum Assessment, Development, Events and Programs, and Young Alumni. The officers of both CMAC and the Board of Directors included: President, Vice President, Secretary, Past President, and Executive Director (the CM Department Head or designee).

This structure was designed to create a self-governing council within the limits and policies of the university. Cal Poly does not permit advisory boards to function as separate 501.c.3 non-profits. CMAC uses the two Cal Poly auxiliaries – the Foundation and the Corporation – to receive gifts and dues, to establish accounts, and to pay for operations and events. Consequently, CMAC is subject to the policies of these two entities. Consistent with those policies, the Executive Director, as an employee of the university, has the fiduciary responsibility for all accounts pursuant to the actions of the Board of Directors and prepares an annual report of expenditures for the Board.

### *Expanded Alumni and Industry Outreach*

The CMAC by-laws created an open membership structure where any individual, association, or corporation associated with construction or construction related industries is free to join the Council. Thus, there are no limits on the size of CMAC which allows it to serve as, in essence, an alumni association for the department. To create a body of more reasonable size to govern the Council and provide more focused advice to the degree program, the general membership elects the Board of Directors. The membership of committees (with the exception of the Executive Committee which is comprised of the officers) and task forces include members of CMAC who may or may not be Directors. The Chairs of each Standing Committee are included on the Board if they are not already members.

Creating this larger, more inclusive body was considered essential to expanding departmental outreach. Already, CMAC has sponsored tailgaters for home football games, regional mixers for alumni and interns in areas throughout the state, and is working with student leaders to host an expanded awards and recognition dinner once a year on campus. The goal is for current students to be aware of CMAC before they graduate and then to recognize this organization as their key means of staying in touch with the department throughout their careers.

### *Membership Categories and Benefits*

Article 2 of the by-laws created five categories of CMAC membership: Legacy, Founder, Individual, Corporate and Association, and Emeritus. The latter three categories of membership are common to many IABs; the first two categories may be unique to Cal Poly, but were essential to make the CMAC work. Legacy membership is open to any individual or corporation with a lifetime history of donations to the department in excess of \$75,000 – no additional annual dues are required to maintain this status. This category was created to honor a commitment made to major donors during an earlier capital campaign that they would be invited to serve on the department's advisory board in perpetuity and, it was felt, it was important to recognize those people making significant opportunities possible for students and faculty. The Founder category was created to honor those individuals who had long been members of the former Industry Advisory Committee, but had not made major financial gifts to the department. The donations of their time had been significant and their colleagues on the board did not want to lose their input in the new structure. Therefore, the Founders were offered permanent seats on the Board of Directors without the requirement for additional dues or contributions. Since the Founder membership status belongs to the individual, not the company, the number of Founders will decrease over time and the number of Legacy members will increase.

Membership benefits for each category (see <http://www.construction.calpoly.edu/content/cmac/cmac-membership>) were established in the by-laws and by action at the first meeting of the Board of Directors. One of the key goals was to insure the participation of a diverse group of alumni and supporters, not just those who were capable of making major financial contributions. Since each Legacy and Founder member was invited to have one permanent seat on the Board of Directors, the by-laws also require that an equal number of Directors are elected from the general membership. Getting this balance right – between the major supporters and the younger alumni the Council was trying to attract – was considered a major accomplishment of the final restructuring. Finally, to boost early general membership of the Council, it was decided to award all graduating seniors from the program an Individual membership at no cost for the first year after graduation.

### *Administrative Support by Paid Staff*

The by-laws provide for the administration of CMAC activities through the California Center for Construction Education (CCCE), the department's outreach arm working under the auspices of the Cal Poly Corporation. The CCCE appoints an Executive Secretary responsible for the day to day activities, events, and communication needs of CMAC and the Board of Directors. This CMAC Executive Secretary now is the first point of contact for all external relations for the department including training, certificate programs, fee-for-service contracts, and the extensive recruiting program for internships and graduates. The Executive Secretary reports to the Department Head (serving as the CMAC Executive Director) and to the Director of the CCCE.

Having this dedicated, full-time staff member in place has been critical to the early success of the CMAC. The position is paid for only with non-State budget allocations (reserves from CCCE and CMAC activities), so the hiring process went through the Cal Poly Corporation. While the benefits through the Corporation are comparable to positions funded with State dollars, the advantage is that entitlements are not created for the position. These entitlements would concern budget officers worried that future non-State dollars might not exist at sufficient levels to cover the cost of the position. The position exists only as long as the need for it exists and funding is available.

### *Development of Revenue Streams*

As soon as a commitment is made to hire staff with non-State budget allocations, the question of developing revenue streams capable of supporting operations becomes paramount. At Cal Poly, this equation was further complicated by creating some membership categories – Legacy and Founders – which were not going to generate any additional sums through membership dues. While some funding would be generated by events and programs, as well as from annual dues for Individuals, other sources would be necessary.

One important source of funding is now coming from the department's major recruiting and placement program – a program that was previously offered at no cost to industry and administered by a staff member paid through State allocation. Providing this service free to private industry at taxpayers' expense is not a model that is followed by any university Career Center. So the administration of the department's recruiting program was moved to the Executive Secretary of CMAC and a fee schedule was established for the information session/interviews program, the semi-annual job fairs, and the more informal "meet and greets" provided for corporate recruiters. While some companies continue with a menu selection of individual services, many are now choosing to become Corporate members of CMAC which includes these services as a membership benefit. The end result is a much better alignment of services provided to private entities and the costs of those services.

In addition to recruiting, having a dedicated staff member focused on external relations is increasing other outreach activities such as training and consulting services – all in line with the mission of the CCCE. As these services continue to expand, the department hopes to find new ways to give back to the industry that has supported the growth of the academic program and has provided so many opportunities for its students. Strengthening that partnership between academia and practitioners is at the core of this success.

### **Conclusions**

The most significant conclusion to be drawn from this case study is that there is no single model for IAB structure that will serve all degree programs. The size and mission of the program, the proximity to urban construction markets, the strength of the alumni network, and the level of ongoing financial support for the program are all variables that must be considered when determining the right structure for each program. There is no one right answer when considering the structure for an IAB. The purpose of this study was to present the case of one program's attempt to sort out the options and find a path that seemed right for them.

At this point in its development, the CMAC at Cal Poly has become self-supporting, primarily by way of its extensive recruiting program provided as a benefit to its members. It is still a challenge, at this time, to create an effective value proposition to increase the number of individual memberships to a level that would provide a significant revenue stream. One of the early successes is the effective functioning of the CMAC committees. They have been active in planning events for members and helping to identify previously unrecognized funding needs for

the department. It is anticipated that upcoming elections for the additional Board members will broaden interest in the activities of CMAC and encourage the participation of more recent graduates. This is still a developing story.

While most IABs will not find it necessary to disband an existing entity and to replace it with a new structure as was done here, many would benefit from the literature review, the benchmarking exercise, and the consideration of other IAB structures and by-laws described here. Starting with a very basic accreditation requirement, it was impressive to see the variability of approaches to advisory boards across the country. It seems clear that the benefits accrued from a “high impact” IAB – one that matches the culture and history of the academic program – far outweigh the challenges of maintaining this effective tool. A regular review to improve its effectiveness is worth the effort.

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## Appendix A

<b>IAB BENCHMARKING</b>		
<b>Rate the following best practices based on the scale below:</b>		
4 = Our IAB really excels at this best practice.		
3 = Our IAB does pretty well for this best practice, but we could use some improvement.		
2 = Our IAB does OK with this best practice, but we need to do a much better job.		
1 = Our IAB pays lip service to this best practice and we need to vastly improve in this area.		
0 = This best practice is not an activity or service of our IAB (or just leave the Ranking blank).		
<b><i>IAB Operating Procedures</i></b>		<b>Rating</b>
Operate under a written set of periodically reviewed and updated Bylaws	<b>2.17</b>	
Develop an IAB strategic plan, associated action plans, and IAB Plan of Work	<b>2.27</b>	
Conduct regularly scheduled meetings with recorded minutes	<b>3.17</b>	
Organize and deliver "high-impact" IAB meetings	<b>3.33</b>	
Recruit "active" IAB members	<b>2.92</b>	
Post activities on the website of the academic program (Bylaws, officers, activities, etc.)	<b>1.83</b>	
Attend ACCE IAB "Best Practices" Events	<b>2.09</b>	
Become a member of ACCE	<b>1.64</b>	
Participate in ACCE Visiting Team Training	<b>1.91</b>	Mean:
Participate as a member of ACCE Visiting Teams	<b>2.50</b>	<b>2.38</b>
<b><i>IAB Program and Curricula Involvement</i></b>		<b>Rating</b>
Serve on program curriculum review committees	<b>2.25</b>	
Serve as class/course reviewers (review syllabus, observe class instruction, and provide assessment)	<b>2.33</b>	
Active participation in the academic program's capstone course	<b>2.25</b>	
Serve as classroom guest lecturers	<b>3.25</b>	
Serve as adjunct faculty (course instructors)	<b>1.83</b>	
Provide "real-world" projects (for use in courses)	<b>3.42</b>	
Provide opportunities for "site visits" and "field trips" to construction operations	<b>3.67</b>	
Serve on the search committees for academic administrators and faculty	<b>2.00</b>	
Serve as a reviewer for the ACCE Self-Study (accreditation report)	<b>2.08</b>	
Meet with the ACCE Visiting Team (during the accreditation site visit)	<b>3.00</b>	
Support student organizations (AGC, ASC, NAHB, CMA, etc.)	<b>3.33</b>	Mean:
Serve as coaches and reviewers for student competition teams and events	<b>3.00</b>	<b>2.70</b>
<b><i>IAB Industry Awareness and Recognition</i></b>		<b>Rating</b>
Provide opportunities for student internships (and job shadowing)	<b>3.92</b>	
Sponsor or conduct leadership development seminars or workshops (for faculty and students)	<b>1.92</b>	
Participate in career fairs and employment expositions	<b>3.33</b>	
Coordinate involvement with industry associations (ACE Mentor Program, AGC, NAHB, ABC, etc.)	<b>2.33</b>	
Meet regularly (i.e., lunch) with academic administrators (chair, dean, provost, and president)	<b>2.42</b>	
Sponsor awards (for outstanding students, faculty, and industry members)	<b>2.17</b>	
Provide opportunities for faculty internships	<b>2.08</b>	
Employ graduates of the academic program	<b>3.83</b>	
Sponsor social events (for students and/or faculty)	<b>2.17</b>	Mean:
Create an electronic (web-based) IAB newsletter	<b>1.67</b>	<b>2.58</b>
<b><i>IAB Funding Mechanisms and Deliverables</i></b>		<b>Rating</b>
Establish an IAB dues structure, if possible (in some political jurisdictions this is not allowed)	<b>1.40</b>	
Create internal development programs (internal fund raising)	<b>2.50</b>	
Sponsor student/department activities (award luncheons, banquets, etc.)	<b>2.50</b>	
Sponsor student scholarships (non-endowed)	<b>2.25</b>	
Spearhead and support efforts to establish endowments (for scholarships and faculty positions)	<b>1.83</b>	Mean:
Actively support the research efforts of the program (financially and administratively)	<b>2.08</b>	<b>2.09</b>