



REPORT

STRATEGIC PLANNING RETREAT ACS Richland Local Section (Richland LS)

April 13 & 14, 2019

Prepared for:

**Kristin Omberg
and
The Richland LS Leadership Team**

By

Kathleen Schulz and Larry Krannich

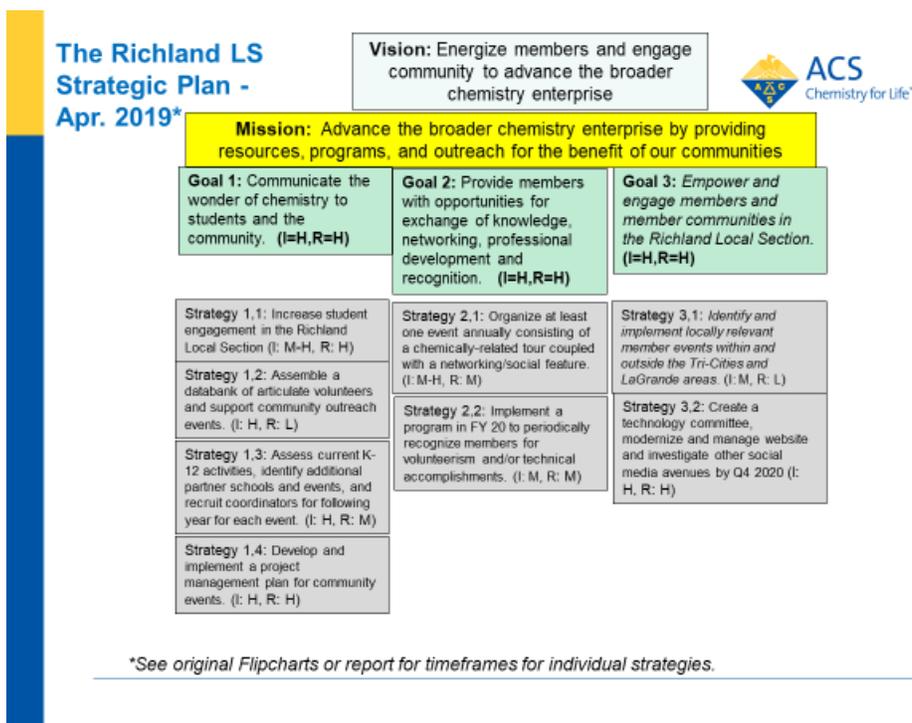
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Executive Summary

This report contains results of a facilitated Strategic Planning Retreat for the ACS Richland Local Section (Richland LS), held in Richland, WA, on April 13-14, 2019. The body of this report presents key outcomes from the retreat, e.g., final decisions and action items. The Appendix contains supporting information e.g., pre-work, intermediate steps and actions, and information which may be useful to guide actions after initial implementation.

The resulting Richland LS Strategic Plan is:



REPORT

1. Background

The ACS Richland Local Section (Richland LS) held a Strategic Planning Retreat in Richland, WA, on April 13 and 14, 2019. The retreat was facilitated, and used ACS LDS™ methodology, as taught in the ACS Strategic Planning Workshop. The planning methodology was provided to participants as pre-reading prior to the retreat and briefly reviewed at the beginning of the workshop. Facilitators then guided participants in applying the strategic planning concepts to the Richland LS situation. Facilitators were Larry Krannich and Kathleen Schulz.

The following people participated in this planning retreat:

Retreat Participants

Susan Asmussen
Shirmir D. Branch
Janet Bryant
Anna Cavinato
Sayan Chatterjee
Sandra K. Fiskum

Tim Hubler
Megan K. Nims
Mariefel V. Olarte
Kristin Omberg
Bri Stavaas-Jamac
Xiao Zhang

2. Approach

RICHLAND LS's strategic planning process started with information gathered in a pre-work survey sent to participants and selected others prior to the planning retreat. This information was augmented by facilitator study of background materials provided prior to the retreat, and ACS Change Drivers and environmental scan information provided by facilitators. (See Participant Guide Appendices). Other pre-retreat preparations included phone calls between Richland LS representatives and facilitators. Through these activities, retreat details were finalized, and existing information and ideas were gathered for proposed Richland LS stakeholders, vision, mission, strengths, weaknesses, and goals prior to the retreat.

At the retreat, the facilitators led participants through the ACS Leadership Development System™ Strategic Planning Process, as documented in the Retreat Participant Guide. Steps in the planning process, in the order covered in the retreat, were:

- Stakeholders, Vision, Mission, Core Values
- Environmental Scan (Using STEP tool)
- Challenges and Opportunities Analysis (Using TOWS tool)
- Goals
 - Identification of Preliminary Goals
 - Down-selection (via discussion and/or voting)
 - Checking Down-Selected Goals vs. SMART Criteria
 - Opportunity Mapping
 - Final Goal Selection
- Strategies
 - Identification of Strategies for Final Goals (Brainstorm)
 - Down-selection (via discussion and/or voting)
 - Checking Goal/Strategy Statements vs. SMART Criteria
 - Opportunity Mapping
 - Final Goal/Strategy Selection
- Implementation Planning
 - Identification of Champions
 - Action Plan Drafting and Discussion
 - Kickoff Date Selection
 - Next Steps

3. Stakeholders, Vision and Mission

a) Stakeholders

Prior to considering vision and mission, facilitators presented Richland LS's pre-work input on stakeholders (see Participant Guide, Appendix D). Participants then discussed priority for the primary stakeholders identified through discussion of pre-work using the definitions shown in the table below.

Priority	Definition
1	Mission critical, high risk if we fail
2	Can leverage to exceed goals or to become mission critical
3	Nice to serve

The results of this discussion are shown below.



Stakeholder/constituency	Priority
Students	1
LS Members	1
Chem-related professionals	2
Community	2

Priority is based on relationship to our mission
1=mission critical or high risk if we fail
2=can leverage to exceed goals or to become mission critical
3=nice to serve

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b) Vision and Mission

At the retreat, facilitators presented pre-work input on proposed vision and mission statements (see report Appendix or retreat Participant Guide). Retreat participants reviewed and discussed the information presented and agreed on the following vision and mission statements.

Richland LS Vision Statement – April, 2019

Energize members and engage community to advance the broader chemistry enterprise

After discussion, retreat participants agreed on the following mission statement:

Richland LS Mission Statement – April, 2019

Advance the broader chemistry enterprise by providing resources, programs, and outreach for the benefit of our communities

4. Current Situation

Prior to considering goals, facilitators led participants in analyzing the local section's current situation via Environment Scan (EScan, using STEP tool) and Challenges/Opportunities Analysis (TOWS tool). These tools provided categories for brainstorming, to ensure focus and to minimize omissions. The Society's 2019 EScan and Change Drivers (Appendix D, PG) informed the process of determining environmental trends significantly impacting Richland LS. These trends were then identified as Threats, Opportunities, Both of N/A. Top strengths and weaknesses of Richland LS, described in the collated pre-work lists (PG Appendices L & M) were also considered and discussed in defining the local section's current situation.

a) Results of Richland LS's Environment Scan (STEP) are below. See original flipcharts for exact wording.

Social

- Chemistry's changing work-force (O)
- Interdisciplinary future (O/T)
- Demographic shifts (O)
- Less volunteer time (T)
- Workplace accommodations (O/T)
- Changing communication styles (O/T)

Technological

- Emergent technologies; personalizing member experiences (O/T)
- IT-based educational tools (O)
- Social media to engage early career/younger members (O)
- Cyber security (T)

Economic

- Changing opportunities/career pathways (O/T)
- Develop environment friendly products, favorable regulations (O)
- Increased chemically related production (O)
- Changing R&D funding (O/T)
- Interplay of national and global economics (N/A)
- Economic diversity in Richland LS area (O)

Political

- Polarization of views towards science (T)
- Politicization of science education (T)
- Global security threats (T)
- Access to scientific knowledge generated through public funding (O)
- Green/sustainable chemistry and applications (O)

b) Results of RICHLAND LS's Challenges and Opportunities Analysis (TOWS) for the above significant environmental factors are summarized below. See original flipcharts for wording.

External Threats

- Interdisciplinary future
- Less volunteer time
- Workplace accommodations
- Changing communication styles
- Emergent technologies; personalizing member experiences
- Cyber security
- Changing opportunities/career pathways
- Changing R&D funding
- Polarization of views towards science
- Politicization of science education
- Global security threats

External Opportunities

- Chemistry's changing work-force
- Interdisciplinary future
- Demographic shifts
- Workplace accommodations
- Changing communication styles
- Emergent technologies; personalizing member experiences
- IT-based educational tools
- Social media to engage early career/younger members
- Changing opportunities/career pathways
- Develop environment friendly products, favorable regulations
- Increased chemically related production
- Changing R&D funding
- Economic diversity in Richland LS area
- Access to scientific knowledge generated through public funding
- Green/sustainable chemistry and applications

Internal Weaknesses

- Digital/Social Media Presence
- Member Engagement*
- Involvement with Others
- Geographic Challenges
- Awareness
- Retention
- Strategic Plan

**Weakness identified for special attention*

Internal Strengths

- Volunteer Strength
- Community Outreach
- Leadership
- Assets
- Activity Portfolio
- New Committees
- Student Chapter

5. Goals

a) Process Overview

Selection of Goals: Participants started with six goal areas identified in Pre-Work (ref. Participant Guide Appendix H), plus key findings from the Richland LS member survey, then considered the following alignments from their situation analysis work – CSFs/Strengths, Weaknesses/Barriers, etc. This resulted in THREE goals for further development at the planning retreat. Further, the goals for the 2019 Richland LS Strategic Plan were developed in the context of priority Stakeholders, final Richland LS Mission statement and additional goals pre-work ideas.

The 6 categories from pre-work, each with numerous proposed goal statement ideas, is shown below. Participants carried three categories (red) forward, creating SMART goal statement for each.

1. Education Outreach
2. Communicate
3. Empower Members
4. Member Value Proposition
5. Membership Growth
6. Membership Engagement

b) Results

The list of RICHLAND LS's SMART goals chosen in this strategic planning session is shown below.

Note: Consult original flipchart PDFs or Preliminary Retreat Report for additional ideas and comments provided by retreat participants.

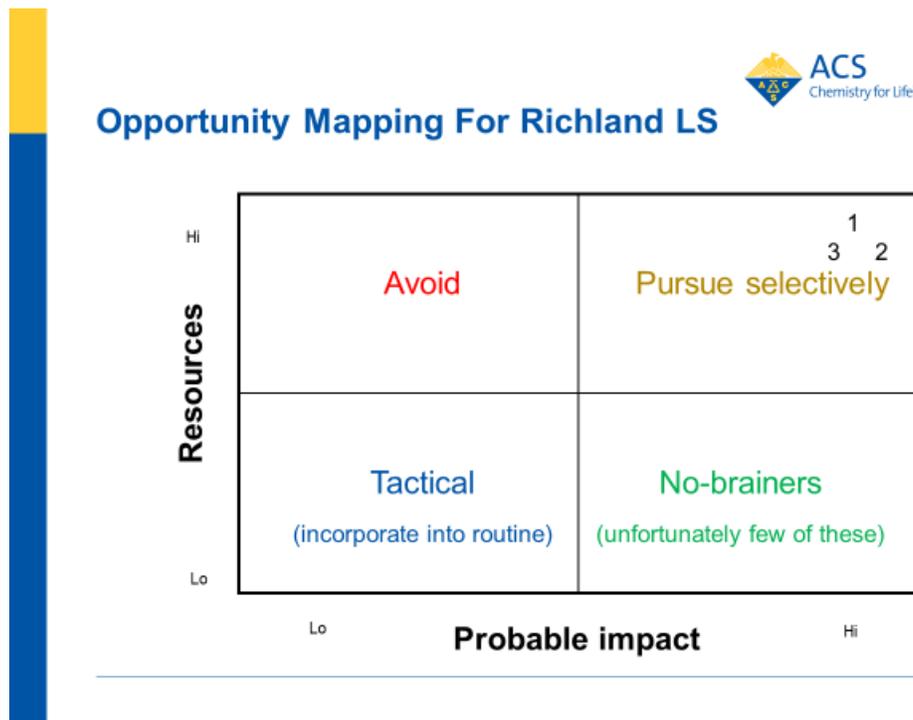
RICHLAND LS 2019 Strategic Plan Goals

Goal 1: *Communicate the wonder of chemistry to students and the community. [Impact, H; Resources, H]*

Goal 2: *Provide members with opportunities for exchange of knowledge, networking, professional development and recognition. [Impact, H; Resources, H]*

Goal 3: *Empower and engage members and member communities in the Richland Local Section. [Impact, H; Resources, H]*

RICHLAND LS Goals Opportunity Map:



6. Strategies

a) Process Overview

Participants brainstormed proposed strategies for the three SMART goals chosen for the 2019 Strategic Plan. Then, breakout groups sorted the ideas into broader categories and weighted voting was used to select ~3 top strategies per goal. SMART goal/strategy combination statements were created and opportunity mapped. The full group reviewed and discussed/refined these statements for inclusion in the final Richland LS 2019 Strategic Plan. *NOTE: Use original flipchart PDFs as authoritative source documents as needed.*

All strategy ideas were documented as pictures/PDF files of flipcharts from the retreat. These were posted to a Dropbox file immediately after the retreat and are included in the Appendix of this report. Facilitators recommend that these remaining ideas be considered for later implementation after successful completion of the initially chosen strategies.

b) Results – Final Goal/Strategies

NOTE: Consult flipchart PDFs for original wording and ideas for tactics.

Goal 1: *Communicate the wonder of chemistry to students and the community.*
[Impact, H; Resources, H]

Strategy 1: Increase student engagement in the Richland Local Section by December 2020.
[Impact, M-H; Resources, H] [Champion: Anna, Tim]
Note: Created by combining original G1-S1 and G3-S3. See original flipcharts for details.

Strategy 2: Assemble a databank of articulate volunteers and support community outreach events. [6 mos after kick-off.] [Impact, H; Resources, L] [Champion: Kristin]
Suggested Tactics: Database of names, email, skills, interests, availability, etc.

Strategy 3: Assess current K-12 activities, identify additional partner schools and events, and recruit coordinators for following year for each event. [Impact, H; Resources, M] [Champion: Megan]
Suggested Tactics: Engage with other organizations; Leverage existing resources; Mentoring (e.g., from EOU students)

Strategy 4: Develop and implement a project management plan for community events. (by 12 months after kick-off) [Impact, H; Resources, H] [Champion: Shirmir]
Suggested Tactics: Develop an online event planning handbook; Identify mechanism to update website and calendar; Establish public relations committee; Repository – e.g., NPR and contacts

Goal 2. *Provide members with opportunities for exchange of knowledge, networking, professional development and recognition.* [Impact, H; Resources, H]

Strategy 1: Organize at least one annual event consisting of a chemically-related tour coupled with a networking/social feature. [Impact, M-H; Resources, M]
[Champion: Mariefel]

Strategy 2: Implement a program in FY 20 to periodically recognize members for volunteerism and/or technical accomplishments. [Impact, M; Resources, M]
[Champion: Sandy]
Suggested Tactics: Recognize through newsletter, website, and meetings; Expand volunteer base; Consider nomination process; Expand current recognition program; Consider “Spotlight” idea.

Goal 3. Empower and engage members and member communities in the Richland Local Section.
[Impact, H; Resources, H]

Strategy 1: Identify and implement locally relevant, member events outside the Tri-Cities and LaGrande areas. (Within 18 mos.) *[Impact, M; Resources, L]*

[Champion: Tim/Anna]

Suggested Tactics: Develop an IPG; Survey what members desire; “Talk in a Box”.
 Also original Strategy 1b as a tactic (see flipchart PDFs). “Offer science cafes, with at least one outside the Tri-Cities/LaGrande areas, at both the general and technical levels.”

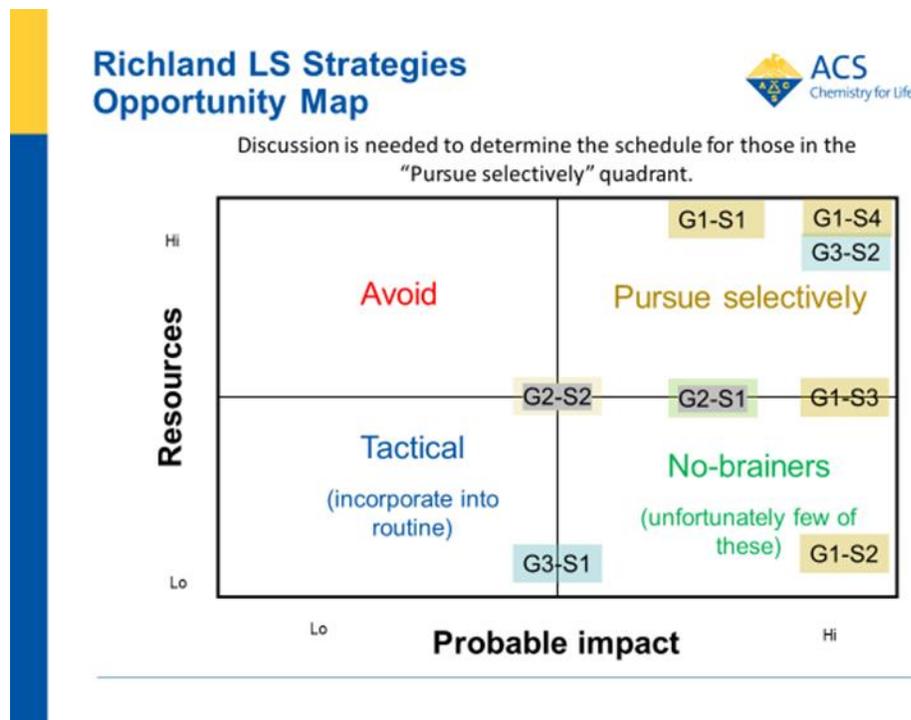
Strategy 2: Create a technology committee, modernize and manage website and investigate other social media avenues by Q4 2020. *[Impact, H; Resources, H]* *[Champion: Bri/ExecComm]*

Suggested Tactics: Advertise positions through Newsletter/website/email;
 Leverage existing ACS social media resources; Use ACS assessment

Strategy 3: COMBINED WITH G1S1 (see original flipcharts for original wording & ideas).

Suggested Tactics: Consider ID/recruit faculty champions

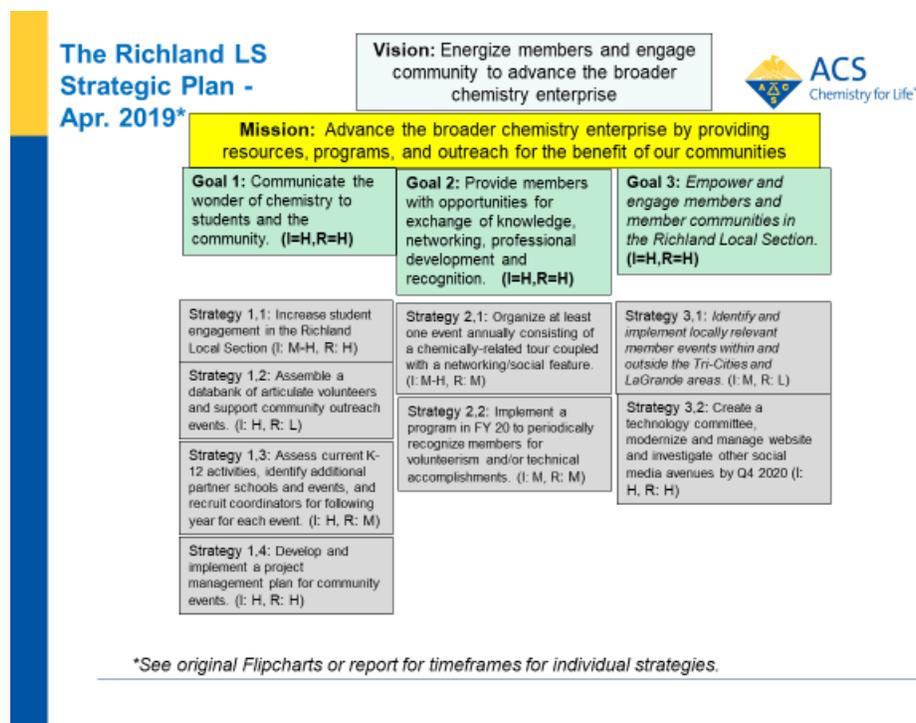
c) Results – Goal/Strategies Opportunity Map



Five of the Local Section’s goal/strategies fall in or on the border of the no-brainer category (G1-S2 & S3, G2-S1 & S2, and G3-S1). These appear to be medium- to high-payoff items with relatively low resource requirements. The LS might choose to implement these immediately, to generate “quick wins”. The remaining three goal/strategies (G1-S1, G1-S4 and G3-S2) fall in the “Pursue Selectively” category – i.e., all require high levels of resources and produce medium-high to high impact. Prior to kickoff, careful consideration should be given to whether the LS has the capacity to implement all three of these goal/strategies initially. If not, consider choosing a more manageable number and develop a phased implementation strategy more compatible with available resources (especially volunteer time).

As noted above, facilitators recommend further discussion prior to kick-off to ensure that implementation activities do not exceed RICHLAND LS’s resources, especially for goal/strategies in the Pursue Selectively quadrant. Facilitators caution against trying to implement too many strategies at kick-off. It is generally better to “set yourself up for success” by choosing fewer goal/strategies for initial implementation. After successfully completing the initial set of goal/strategies, the team can then choose the next set in a phased plan.

An outline of the Richland LS 2019 Strategic Plan developed during this retreat is shown below. **NOTE:** Consult original flipcharts as needed for unedited wording.



7. Implementation Plan

Moving forward and ensuring success with a strategic plan requires attention to several key components: (1) A clear, fully resourced plan, agreed to by the leadership group; (2) clear accountability – i.e., who is responsible to ensure that the entire plan and each of its strategies remain on track; and (3) a system for ongoing regular monitoring of progress vs. plan. The preceding sections of this report represent substantial progress toward a clear, fully resourced plan. Remaining are final action plans, with defined resource requirements, accountabilities and monitoring.

a) Champions

Champions for each goal/strategy, and for the entire plan, were identified and are named in the table below. Champions are responsible for preparing the project plan and recruiting a project leader, or leading the project themselves. That is, champions, fulfill requirement #2 above.

Richland LS Strategic Plan 2019 Champions



What	Champion
Goal 1, Strategy 1	Anna/Tim
Goal 1, Strategy 2	Kristin
Goal 1, Strategy 3	Megan
Goal 1, Strategy 4	Shirmir
Goal 2, Strategy 1	Mariefel
Goal 2, Strategy 2	Sandy
Goal 3, Strategy 1	Tim/Anna
Goal 3, Strategy 2	Bri/Exec Committee
Richland LS Strategic Plan	Ram, Kristin, Sandy

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b) Project Plans

Facilitators explained the importance of establishing measures to track progress and understand effectiveness of the Plan (see Participant Guide). They described a performance measurement model and explained how measures are developed. They also discussed the research on successful plans and goal achievement.

Small teams led by the Champions then spent time drafting action plans for their goal/strategy using the project plan template provided (Participant Guide, Appendix B). Champions then reported on their proposed action plans and the full group discussed/refined the plans. Refined action plans were to be forwarded to Richland LS Strategic Plan Champions (Ram, Kristin, Sandy) immediately after this retreat.

c) Pitfalls

The following list of common implementation pitfalls to be avoided was reviewed with participants.

Some Common Implementation Pitfalls



- Trying to do it all yourself; not delegating
- No accountability system (timeline/reminders)
- Not assessing and managing available time
- Not involving other Local Section members
- Not getting buy-in from the Local Section
- Measuring activities instead of results
- Not developing timelines and milestones
- Not developing detailed action plans for strategies
- No follow-up/follow-thru between face-to-face meeting work
- Not using volunteers' motivations when engaging volunteers for their skills
- Not monitoring the progress of the strategic plan
- Not celebrating successes

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d) Next Steps

Participants agreed on next steps and kickoff date shown in the graphic below.

Richland LS Next Steps



What	Who	When
SPR Attendees Receive Plan	Facilitators	Within 2 weeks
Notify who else? David H,	Facilitators	Within 2 weeks
Plan placed onto website & email blast	Webmaster; Anna	End of April
Engage others in actions – who?		
Rough Project Plans done	Project Champions	April 22
Approval of plan	Board	May 15
Project Leads Identified	Board	June 12
Project Teams Identified	Project Leads	July 1
Set up project management and accountability system/GANNT chart	Plan Champions	TBD (Prior to 8/1/19)
KICK OFF	Richland LS	August 1

8. Retreat Evaluation

Participants provided real-time feedback on the retreat as shown below.

Retreat Evaluation: Plus/Deltas & “Five Fingers”:

Five Fingers Score: 4.8/5.0

Overall Retreat Feedback



Headlines/What Went Very Well

- Process
- Integration of the work
- Examples (from other LSs)
- Facilitators/Teamwork

What Would You Do Differently

- Contents of box from HQ (what to provide vs what ACS sends)
- More on what to expect at SPR
- Access to other LS SPs
- LSAC resources available
- ACS organizational chart

APPENDIX

(See Separate Document)

1. ACS 2019 Strategic Plan
2. Strategic Planning Worksheets
3. Glossary of Strategic Planning Terms
4. ACS Eight Change Drivers
5. Richland LS Pre-work Compilation (PG Appendices E-L)
6. Proposed Strategies Brainstorm Results & Vote Tallies
7. Project Plan Template
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