REPORT

STRATEGIC PLANNING RETREAT
Virginia Local Section
Hilton Richmond Hotel & Spa
September 10 – 11, 2016

Prepared for: The VALS Leadership Team
By: Carol Duane and Larry Krannich
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Executive Summary

This report contains results of a facilitated Strategic Planning Retreat for the Virginia Local Section of the American Chemical Society held in Richmond, VA on September 10-11, 2016.

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 compilations, intermediate steps and actions, and information, which may be useful to guide actions after initial implementation.

Participants noted key benefits/outcomes from the retreat: the structure, process and tools utilized for developing their strategic plan worked well enabling the group to stay focused and on track; ongoing programs and activities were incorporated as strategic activities; the team is energized and ready to start implementing and can offer a strategic value proposition for members with many opportunities be more engaged and involved.

The resulting VALS Strategic Plan for 2016-2021 is depicted graphically below:
REPORT

1. Background

The Virginia Local Section (VALS) held a Strategic Planning Retreat in Richmond, VA on September 10-11, 2016. The retreat was facilitated, and used ACS LDS™ methodology, as taught in the ACS Strategic Planning Workshop. The planning methodology was reviewed with participants at the beginning of the workshop. Facilitators then guided participants in applying the strategic planning concepts to the VALS situation. Facilitators were Larry Krannich and Carol Duane.

Fourteen VALS leaders participated in the strategic planning workshop:

<table>
<thead>
<tr>
<th>Attendee</th>
<th>VA Section Title</th>
<th>Professional Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Denise Walters</td>
<td>Chair</td>
<td>Pfizer</td>
</tr>
<tr>
<td>2. Colleen Taylor</td>
<td>Chair Elect</td>
<td>Virginia State University</td>
</tr>
<tr>
<td>3. Kathleen Sink</td>
<td>Vice Chair</td>
<td>Altria</td>
</tr>
<tr>
<td>4. Thaddeus S. Hannel</td>
<td>Treasurer</td>
<td>Altria</td>
</tr>
<tr>
<td>5. Ann Sullivan</td>
<td>Councilor/Webmaster</td>
<td>J. Sargent Reynolds Community College</td>
</tr>
<tr>
<td>6. Joseph Crockett</td>
<td>Alternate Councilor</td>
<td>Bridgewater College</td>
</tr>
<tr>
<td>7. Joseph Pompano</td>
<td>Alternate Councilor/Safety Committee Chair</td>
<td>Eurofins Lancaster Labs</td>
</tr>
<tr>
<td>8. Stephanie Mabry</td>
<td>Trustee/ Women Chemist Committee Chair</td>
<td>Afton Chemical</td>
</tr>
<tr>
<td>9. Philip Burks</td>
<td>Trustee</td>
<td>Retired</td>
</tr>
<tr>
<td>10. Janet Aspers</td>
<td>Alternate Councilor</td>
<td>University of Mary Washington</td>
</tr>
<tr>
<td>11. Brandi Ford</td>
<td>Student</td>
<td>Virginia State University</td>
</tr>
<tr>
<td>12. Krista Weissbart</td>
<td>Media Public Relations Committee Chair</td>
<td>Pfizer</td>
</tr>
<tr>
<td>13. Todd Koch</td>
<td>Immediate Past Chair/Nominations Committee Chair</td>
<td>Pfizer</td>
</tr>
<tr>
<td>14. Lynette Watkins</td>
<td>Councilor</td>
<td>James Madison University</td>
</tr>
<tr>
<td>15. Rhonda Butts McGee</td>
<td>Younger Chemist Committee –Co Chair</td>
<td>Execupharm</td>
</tr>
</tbody>
</table>
2. Approach

Although the Virginia Local Section (VALS) is very active with ‘lots going on’, the leaders felt there could be a stronger value proposition for their membership and that a formal strategic plan such as the ACS planning process used in the SPRs could help them overcome past unsuccessful efforts to overcome outmoded traditions and make strategic changes.

VALS’s strategic planning process began with a needs analysis survey of the local section membership developed in conjunction with the ACS Research team. Information was simultaneously gathered in a pre-work survey sent by the facilitators to the Strategic Planning Retreat (SPR) participants prior to the planning retreat. This information was augmented by facilitator study of background materials on the VALS website, and the environmental scan for local sections provided by facilitators. Other pre-retreat preparations included phone calls and emails between the VALS retreat planning team and facilitators. Through these activities, retreat details were finalized, and existing information and ideas were gathered for proposed VALS mission, vision, 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:

- Vision, Mission, Core Values (including Stakeholder analysis)
- Environmental Scan (STEP tool)
- Strengths and Weaknesses
- Challenges and Opportunities Analysis (TOWS tool and prioritizing)
- Goals
  - Identification of Preliminary Goals (Pre-work, T/Os)
  - Checking Preliminary Goals vs. SMART Criteria
  - Opportunity Mapping
  - Final Goal Selection
- Strategies
  - Identification of Strategies for Final Goals (Brainstorm)
  - Down-selection (via discussion and weighted voting)
  - Checking Goal/Strategy Statements vs. SMART Criteria
  - Opportunity Mapping
  - Final Goal/Strategy Selection 2016-2021 (Discussion)
- Implementation Planning
  - Identification of Champions
  - Next Steps
  - Pitfalls
3. **Vision and Mission**
   
a) **Stakeholder Analysis**

   At the retreat, the group performed a Stakeholder analysis by ranking the list of potential stakeholders compiled from pre-work. Each potential stakeholder was ranked as being directly (D) or indirectly (I) impacted by the success of the VALS mission. Then those stakeholders determined to be directly impacted were assigned a priority ranking: Priority 1 – mission critical or high risk if mission fails, Priority 2 – VALS can leverage related interactions to exceed goals or to make stakeholder mission critical, or Priority 3 – stakeholder is nice to serve only. Indirect stakeholders were not assigned a ranking.

   Through this analysis, the key Stakeholders for VALS were identified and used as the target audience for refining the VALS strategic plan. The consensus showed a clear, strong focus for the local section is the Members.

<table>
<thead>
<tr>
<th>VA LS Key Stakeholders</th>
<th>Direct/Indirect Impact by VALS (D or I)</th>
<th>Priority 1,2, or 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>VA LS Members</td>
<td>D</td>
<td>1</td>
</tr>
<tr>
<td>LS Officers</td>
<td>D</td>
<td>1</td>
</tr>
<tr>
<td>Younger LS Members</td>
<td>D</td>
<td>1</td>
</tr>
<tr>
<td>Senior LS Members</td>
<td>D</td>
<td>2</td>
</tr>
<tr>
<td>Students</td>
<td>D</td>
<td>2</td>
</tr>
<tr>
<td>Job Searchers</td>
<td>D</td>
<td>2</td>
</tr>
<tr>
<td>Chemical Professionals</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Industrial Chemists</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>General Public</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Financial Sponsors</td>
<td>I</td>
<td></td>
</tr>
</tbody>
</table>
b) Vision

Facilitators next discussed the purpose of developing Vision statements, providing examples crafted by other ACS local sections, and presenting vision-related information from the VALS pre-work (PG Appendix D). It was recognized that several statements in the pre-work embodied key concepts to be incorporated and after discussion, the participants agreed on the following vision statement:

**VALS Vision Statement – September 10, 2016**

*The Virginia Local Section serves the community by advancing chemistry and communicating its impact on people’s lives.*

Note: The importance and value of defining Core Values for VALS was noted but development was deferred to a later time due to time constraints of the retreat.

c) Mission

With this Vision statement and the stakeholders discussions as context, the facilitators presented VALS pre-work input on proposed mission statements (see PG Appendix F). Retreat participants reviewed and discussed the ideas in the list of statements presented and agreed on the following purposes for the VALS to achieve their stated Vision:

**VALS Mission Statement – September 10, 2016**

*Inspiring, educating, developing, and connecting Virginia chemists and the community for the benefit of Earth and its people.*
4. Current Situation

Prior to establishing goals to accomplish the Mission, participants analyzed VALS’s current situation by structured brainstorming for Environment Scan (STEP Tool) and Challenges/Opportunities Analysis (TOWS Tool). These tools provided categories for brainstorming, to ensure focus and that nothing was missed. The resulting data were used as reference points for the retreat discussions.

a) Results of VALS’s Environment Scan (STEP):

**Social**
1. Shifting demographics (age, location, ethnicity, gender) & multigenerationality
2. Changing attitudes and perceptions of membership organization
3. Time balance – other obligations
4. Changing nature of community influenced by technology
5. Societal view of chemistry

**Economic**
1. Consolidation of local chemical industry
2. State budgets
3. Shrinking grant funding
4. Cost of medical insurance – impacts career decisions
5. Lack of financial commitment for development
6. Financial uncertainty for the Local Section
7. Federal jobs
8. Shifting employment paradigm -- toward contractor/consulting jobs; adjunct faculty; start up company roles

**Technological**
1. So many social media tools
2. Bandwidth of people
3. Tools have a learning curve
4. Availability of webinars
5. Resistance to technology
6. More susceptibility to Hackers
7. Young members prefer particular technology
8. Loss of social interaction

**Political**
1. State funding
2. Industrial identity as chemists
3. Safety (leading to paranoia/insurance)
4. Polarization of science education
5. Globalization
6. Contractor jobs on the increase
   - Security
   - Membership as fringe
7. On-line/dry labs
8. Boring K-12 science
9. Regulation
b) Results of VALS’s Challenges and Opportunities Analysis (TOWS).

In breakout group discussions, VALS’s key strengths and weaknesses were prioritized from the pre-work lists in Appendixes G and H of the Participant Guide and confirmed by the group as a whole. Two potential critical flaws were identified as needing to be addressed. These were more than balanced by five key strengths to leverage in setting goals and strategies. Top STEP trends (as identified above) were next categorized by silent brainstorm as challenges or opportunities with respect to VALS’s key strengths and weaknesses. The ten top opportunities were identified by dot voting. (Note: Trends not designated as opportunities are by default categorized as threats).

<table>
<thead>
<tr>
<th>External Threats</th>
<th>External Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Resistance to technology</td>
<td>2. Shifting demographics (age, location, ethnicity, gender) &amp; multigenerations (11)</td>
</tr>
<tr>
<td>3. More susceptibility to Hackers</td>
<td>3. So many social media tools (11)</td>
</tr>
<tr>
<td>4. Cost of medical insurance – impacts career decisions</td>
<td>4. Young members prefer particular technology (11)</td>
</tr>
<tr>
<td>5. Financial uncertainty for the Local Section</td>
<td>5. Shifting employment paradigm -- toward contractor/consulting jobs; adjunct faculty; start up company roles (T/O)</td>
</tr>
<tr>
<td>6. Federal jobs</td>
<td>• Contractors fringe (benefit) (10)</td>
</tr>
<tr>
<td>7. Shifting employment paradigm -- toward contractor/consulting jobs; adjunct faculty; start up company roles (T/O)</td>
<td>6. Consolidation of local chemical industry (9)</td>
</tr>
<tr>
<td>8. Industrial identity as chemists</td>
<td>7. Availability of webinars (9)</td>
</tr>
<tr>
<td>9. Safety (leading to paranoia/insurance)</td>
<td>8. Regulation (8)</td>
</tr>
<tr>
<td></td>
<td>10. Boring K-12 science(8)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Internal Weaknesses (Key)</th>
<th>Internal Strengths (Key)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Activities/meetings are not engaging or multigenerational**</td>
<td>1. Active Participation/Engagement/Passion of leaders/volunteers/sponsors</td>
</tr>
<tr>
<td>2. Ineffective Value Proposition</td>
<td>2. Good Outreach</td>
</tr>
<tr>
<td>3. Lack of Communication/technology use**</td>
<td>3. Knowledgeable Members with broad background</td>
</tr>
<tr>
<td>4. Low Level of Participation/Involvement</td>
<td>4. Membership Diversity</td>
</tr>
<tr>
<td>5. Large Geographic Area</td>
<td>(academic/government/industry)</td>
</tr>
<tr>
<td></td>
<td>5. Strong Financial Health</td>
</tr>
</tbody>
</table>

** critical flaws
5. **Goals**

a) **Process Overview**

Participants started with a list of 37 potential goal statements (PG Appendix F), compiled and collated from the pre-work into nine broad categories by facilitators. Upon reviewing these statements, along with the top priority opportunities identified in the SWOT analysis, the clear focus on members noted in the stakeholder discussions and the two potential critical flaw areas resulted in three themes: member engagement, involvement and opportunities. In addition, thinking about leveraging their strengths, a fourth outward looking area was recognized. Using these four themes and using similar ideas from the examples as models, four goal statements were developed.

The four draft goals were made SMART (see SMART criteria in Retreat Participant Guide) and each was ranked High-Medium-or Low, first with respect to probable impact if achieved, and second, resources required. These goals were then plotted on an Opportunity Map (shown below) and further discussed. Two of the 4 goals fell on the line between pursue selectively and no brainers, being ranked as High Impact and requiring Medium resources. The other two landed in the Pursue selectively quadrant. It was noted that development of Goal strategy combinations would provide deeper insights for differentiation and prioritization for implementation and the section likely has sufficient resources to pursue all four areas. Therefore, it was decided to develop strategies for all four Goals.

VALS Goals Opportunity map:
The list of VALS’s SMART goals chosen for 2016-2021 is shown below.

**Goal 1:** Establish, implement and maintain a technology strategy to ensure membership is engaged and informed of events, opportunities, and services.  *Impact, High; Resources, High*

**Goal 2:** Cultivate member involvement strategies to increase local section volunteerism, attendance, and leadership.  *Impact, High; Resources, Medium*

**Goal 3:** Provide members with opportunities for career and social networking, exchange of knowledge, and professional development, which span the broader chemical fields.  *Impact, High; Resources, Medium*

**Goal 4:** Provide community outreach that increases the positive perception of chemistry and the ACS.  *Impact, High; Resources, High*

c)  Additional Notes on Goals

**Goal 1:** An identified critical flaw is Lack of Communication/technology use; an upgraded infrastructure will improve communications and facilitate implementation of the other goals.

**Goal 2:** This goal enhances the member value proposition benefiting the member as well as the local section.

**Goal 3:** This goal addresses the second critical flaw - Activities/meetings are not engaging or multigenerational - leverages strengths and enhances the value proposition.

**Goal 4:** This goal takes advantage of the activity that the section is already doing well and highly leverages strengths.
6. Strategies

a) Process Overview
Participants brainstormed strategies for the four SMART goals chosen for 2016-2021. Then, via discussion, eleven strategies were selected for possible implementation commencing in the year after kicking off the plan. The resulting goal/strategy combinations were then made SMART and plotted on the opportunity map.

A list of all strategies considered for VALS’s four goals is in the Brainstormed Strategies document (Attachment) of this report. It was also emailed to all participants with the Summary Report. After successfully completing strategies chosen for 2016-2017, this list can be used to choose additional strategies for implementation.

Champions and other volunteers were identified for each goal/strategy combination. Champions are responsible for completing and leading execution of a project plan, or alternatively to recruit Project Leads to do so. A Word document template for project planning is included as an Attachment; a copy is in the Participant Guide Appendix B.
b) Strategies Development

Strategies for each Goal were developed by discussion of the brainstormed ideas. A maximum of three top strategy areas for development were selected using weighted voting. The weighted priority statements were clustered by category and the top weighted ideas used to develop the strategy statements.

Goal 1 (31 brainstormed ideas)
S1 – webinars; #10, #11
S2 – website; brainstormed statements #3, #5
S3 – new ways; brainstormed statements #22, #30

Goal 2 (39 brainstormed ideas)
S1 – New members; brainstormed statements #8, #12, #2
S2 – Location; brainstormed statements #34, #37
S3 – Meetings; brainstormed statements #26

Goal 3 (29 brainstormed ideas)
S1 – Mentoring; brainstormed statements #23
S2 – Events brainstormed statements #12, #15, #19
S3 – New members; brainstormed statements #3

Goal 4 (29 brainstormed ideas)
S1 – K-12; brainstormed statements #21, #22
S2 – Regional Reps; brainstormed statements #25, #26
S3 – Inventory; brainstormed statements #18

Each Goal/strategy combination was then checked against SMART criteria and ranked H-M-L as to Impact if successfully accomplished and against Resources needed. Discussion and selection of the top priority Goal/Strategy combinations was focused by the ‘So that’ criteria as illustrated.

c) Results

Goal/strategies Opportunity Mapping & discussion: Twelve Goal/strategies were developed. Two of VALS’s goal/strategies fell in the tactical and three in the no-brainer quadrants, indicating VALS should consider attending to these immediately. Strategies G2-S1 and G3-S3
were combined. Two strategies fell on the medium impact with medium resources edge of the Pursue selectively quadrant and the remaining five strategies were ranked as high impact requiring medium to high resources. Group discussion and a consideration of the target dates for completion of these strategies did not defer or eliminate any of these strategies. The group concluded preliminarily that all strategies could be achieved, based on the criteria (dates, etc.) set. However, it was recommended by the facilitators in the next steps discussion that these strategies should be re-examined and prioritization confirmed or adjusted, particularly if it seemed that there would be multiple calls on the same pool of resources (people and dollars) that might be committed to other activities. Facilitators recommend that the group discuss each of these goal strategy combinations relative to which could be accomplished in a relatively short period of time to impart an early success to prioritize amongst them. In some cases, ongoing, extant and already initiated local section activities and efforts could be purposed to execute these strategies.

Opportunity Map for VALS’s 2016-2017 Goal/Strategy Combinations:
An outline of VALS’s Strategic Plan for 2016-2021, including strategies for 2016-2017, is shown below. It is represented graphically in the Executive Summary.

**GOAL 1:** Establish, implement and maintain a technology strategy to ensure membership is engaged and informed of events, opportunities, and services.  *[Impact, High; Resources, High]*

**Strategy G1-S1**
Implement live stream of a minimum of four monthly meetings each year beginning in 2017.  *[Impact, High; Resources, Low] [Champion: Kathleen]*

Tactics:

**Strategy G1-S2**
Form a website taskforce that includes all demographics (1/1/17) to conduct a needs assessment (6/1/17), obtain quotes for pro web designer/intern (9/1/17), and launch new site (1/1/18).  *[Impact, High; Resources, High] [Champion: Ann/Brandi]*

Tactics:

**Strategy G1-S3**
By June 2017, inventory and define how to integrate new forms of communication strategies into the current constructs of the local section wherever possible.  *[Impact, High; Resources, Medium] [Champion: Janet]*

Tactics:
GOAL 2: Cultivate member involvement strategies to increase local section volunteerism, attendance, and leadership.  *[Impact, High; Resources, Medium]*

Strategy G2-S1
By May 2017 Executive meeting, Hospitality committee will create an expanded on-boarding process for new members.  *[Impact, High; Resources, Low] [Champion: Todd]*
Tactics:

Strategy G2-S2
Define 4 to 5 regions within VA Section (1/1/17) to leverage universities in regions to provide high-end technical talks (beginning Fall 2017) through their established seminar program.  *[Impact, Medium; Resources, Low-Medium] [Champion: Joe]*
Tactics:

Strategy G2-S3
In 2017, hold two or three monthly meetings/events for members on weeknights other than Friday.  *[Impact, Medium; Resources, Low] [Champion: Denise]*
Tactics:
**GOAL 3:** Provide members with opportunities for career and social networking, exchange of knowledge, and professional development, which span the broader chemical fields.  

*Impact, High; Resources, Medium*

**Strategy G3-S1**  
By end of December 2016, re-evaluate current mentoring strategies, assess needs, and present a proposal to Exec. Meeting.  

*Impact, High; Resources, High*  
*Champion: Kathleen/Colleen*

**Tactics:**

**Strategy G3-S2**  
In 2017, the VA LS will support/leverage at least two ongoing networking, outreach, educational, and development events at local university and business partners across the region.  

*Impact, Medium; Resources, Medium*  
*Champion: YCC*

**Tactics:**

**Strategy G3-S3**  
Re-energize and re-name the Hospitality Committee *(combined with G2,S1)* with regional representation and hold a social activity in 3 to 5 of the regions.  

*Impact, Medium; Resources, Medium*  
*Champion: Todd*

**Tactics:**
**GOAL 4:** Provide community outreach that increases the positive perception of chemistry and the ACS.  
*Impact, High; Resources, High*

**Strategy G4-S1.** By Spring 2018, coordinate activity with Richmond Math/Science Innovation Center and AACT.  
*Impact, High; Resources, High*  
*Champion: Krista*

Tactics:
- Ask what needs are
- Advertising
- Blast to teachers & parents
- Door prizes to AACT membership
- LS Education Grant workshop

**Strategy G4-S2**  
By January 2017, identify and support regional coordinators for ACS branded community activities.  
*Impact, High; Resources, Medium*  
*Champion: Phil/Linette*

Tactics:

**Measurers:**
- # of ACS volunteers, # of non-ACS volunteers, # of participants, Costs.

**Strategy G4-S3**  
By the May Exec. Meeting, review activities already in place to identify/align current activities with objectives.  
*Impact, High; Resources, Low*  
*Champion: Stephanie*
7. Implementation Plan - Moving Forward and Ensuring Success with the VA LS Plan

a) Next Steps

Facilitators recommend special attention to setting up an accountability system (regular reporting, etc.) to ensure ongoing progress toward achievement of the goals/strategies VALS selected for 2016-2017 focus.

Participants discussed key factors for project implementation and agreed on next steps:

### Virginia Local Section Next Steps

<table>
<thead>
<tr>
<th>What</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>VA LS Receives Plan</td>
<td>September 15</td>
</tr>
<tr>
<td>Notify Executive Committee</td>
<td>September 16</td>
</tr>
<tr>
<td>Write a newsletter article</td>
<td>September 23</td>
</tr>
<tr>
<td>Plan placed onto website</td>
<td>September 30</td>
</tr>
<tr>
<td>Notify VA LS membership</td>
<td>October 10</td>
</tr>
<tr>
<td>Executive Committee open discussion</td>
<td>December 10</td>
</tr>
<tr>
<td>Rough Project Plans done</td>
<td>January 15, 2017</td>
</tr>
<tr>
<td>Approval of plan</td>
<td>January 20, 2017</td>
</tr>
<tr>
<td>KICK OFF</td>
<td>January, 2017</td>
</tr>
</tbody>
</table>

**Kickoff:**

<table>
<thead>
<tr>
<th>WHAT</th>
<th>WHO</th>
<th>BY WHEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliver “Plan” to VA LS members via website</td>
<td>VA LS Chair</td>
<td>September 30, 2016</td>
</tr>
<tr>
<td>Discuss and approve plan</td>
<td>VA LS Chair, VA LS</td>
<td>January 20, 2017</td>
</tr>
<tr>
<td>Plan is implemented</td>
<td>VA LS</td>
<td>January, 2017</td>
</tr>
</tbody>
</table>
b) Pitfalls to avoid to achieve successful implementation

- Not delegating
- Trying to all by yourself
- No accountability system (timeline/reminders)
- Not assessing and managing time available
- 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
1. Stakeholders Analysis Prework (Participant Guide Appendix C)
4. Brainstormed Strategies – Weighted Votes (Attachment)
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