Virginia Local Section

Strategic Planning Retreat

August 5-6, 2023

Facilitators:
  Bill Carroll
  Nigel Sanders

Improving all people's lives through the transforming power of chemistry
Expectations for This Strategic Planning Retreat

- Excitement
- Survival
- Volunteers
- Growth
- Progress
- Reconnection
- Unity
- Newness
- Executives
Virginia LS 2023-2028 Strategic Plan*

**Vision**
Vision: Empowering an inclusive community through chemistry

**Mission**
Mission: Connecting and engaging the chemistry community for a sustainable future

**Goals & Strategies**

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*As approved by XXX, date
Strategic Planning Process

Quick Overview
Strategic Planning Retreat Flow

STEP 1
RETROSPECTIVE ANALYSIS, STAKEHOLDERS, VISION & MISSION

STEP 2
GOALS

STEP 3
SWOT ANALYSIS

STEP 4
STRATEGIES

STEP 5
PROJECT PLANS

STEP 6
IMPLEMENTATION
Developing a Plan for Virginia Local Section

STAKEHOLDERS, VISION, AND MISSION
Virginia LS Stakeholder Mapping

Arrows indicate direction
Virginia LS must move these stakeholder groups

Interest In Stakeholder
How important are they to us?

<table>
<thead>
<tr>
<th>Interest In Stakeholder</th>
<th>How important are we to them?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>Higher</td>
</tr>
<tr>
<td>Sectors</td>
<td>Higher</td>
</tr>
<tr>
<td>Students</td>
<td>Lower</td>
</tr>
</tbody>
</table>

Influence on Stakeholder
How important are we to them?

Direct
Impact
Indirect

Lower
Importance
Higher
Final Virginia LS Vision Statement

Vision: Empowering an inclusive community through chemistry
Mission: Connecting and engaging the chemistry community for a sustainable future
Developing a Plan for Virginia Local Section

SWOT: STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS
## Virginia LS SWOT Matrix

### ENABLERS

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engagement of Leaders</td>
<td>5</td>
</tr>
<tr>
<td>Experience</td>
<td>3</td>
</tr>
<tr>
<td>Finances</td>
<td>2</td>
</tr>
<tr>
<td>Outreach</td>
<td>2</td>
</tr>
</tbody>
</table>

### CHALLENGES

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engagement of Members</td>
<td>6</td>
</tr>
<tr>
<td>Communication</td>
<td>2</td>
</tr>
<tr>
<td>Succession Planning</td>
<td>2</td>
</tr>
</tbody>
</table>

### OPPORTUNITIES

- Technology/Communications
- Access to membership
- Reorg. Exec Comm.
- Educational institutions

### THREATS

- Disengagement
- Value Proposition
- Generational Barriers
- Unappealing meetings
Developing a Plan for Virginia Local Section

GOALS AND STRATEGIES
Final Goal Statements

Goal 1: Membership. Engage and empower our member communities through leadership development and communicating the value of ACS.

Goal 2: Outreach. Promote a positive perception of chemistry and the ACS through community activities.

Goal 3: Professional Development. Provide members awareness of wider career opportunities and applications.
Strategies to Reach Your Goals

Strategies should be set to achieve your goals, with a 6 to 18 month timeframe.

In framing strategies,

- Determine if there is a "critical flaw" weakness that needs to be addressed
- Build on your strengths and critical success factors
- Take advantage of opportunities (Challenges & Opportunities)
- Review pre work goal statements that were not developed as goals; maybe they were strategies

You should achieve SMART when both goal and strategy statements are combined.
Evaluating Strategy: SMART

- **Specific**: The strategy should identify a specific action or event that will take place.
- **Measurable**: The strategy and its benefits should be quantifiable.
- **Achievable**: The strategy should be attainable given available resources.
- **Relevant**: The strategy should be aligned with your goal and other efforts and needs.
- **Time bound**: The strategy should state the time period in which it will be accomplished.

Although either the goal or strategy statement may themselves not address all the criteria, when the goal/strategy combination is considered together it should address all the criteria.
Verbatim ‘Sticky Note’ Ideas
OUTREACH

Verbatim ‘Sticky Note’ Ideas
Verbatim 'Sticky Note' Ideas

- Career / employ

- Professional Development
  - Workshops
  - Inviting employees to develop personal skills
  - Problem solving
  - Organizing events with people from different areas

- Professional Development
  - Networking event
  - Technical sessions

- Professional Development
  - Conference sessions

- Professional Development
  - Leadership workshop

- Professional Development
  - Mock job interview

- Professional Development
  - Panels of different career / chemistry opportunities

- Professional Development
  - Leadership workshop

- Professional Development
  - Professional development

- Professional Development
  - Professional development

- Professional Development
  - Professional development

- Professional Development
  - Professional development

- Professional Development
  - Professional development
Sticky Notes with Deferred Strategies
Membership

• Strategy 1: Value. By end 2024, develop effective resources to promote the benefits of being an ACS member. I: H, R: M

• Strategy 2: Social/Meetings. By January 2024 develop a plan to diversify meetings/social events to increase member engagement. I: H, R: M

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Professional Development

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• Strategy 3: Mentorship. Develop a mentorship program for chemistry students that begins in Fall, 2025. I: H, R: M
Opportunity Map For Virginia LS

Discussion is needed to determine the schedule for those in the “Pursue selectively” quadrant.
Deferred Strategies

- Goal 1: Support
- Goal 2: Non-chemistry community; Geography
- Goal 3: Website/communication
## Strategic Plan Champions

<table>
<thead>
<tr>
<th>What</th>
<th>Champion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership: Value</td>
<td>Jack, Janet</td>
</tr>
<tr>
<td>Membership: Social/meetings</td>
<td>Ashley, Brandi</td>
</tr>
<tr>
<td>Membership: Structure</td>
<td>Julian, Rob</td>
</tr>
<tr>
<td>Outreach: Social Media</td>
<td>The Baz’</td>
</tr>
<tr>
<td>Outreach: K-12</td>
<td>Charlene, Joe</td>
</tr>
<tr>
<td>Outreach: Student Chapters</td>
<td>Ashley, Carissa</td>
</tr>
<tr>
<td>Professional Development: Events</td>
<td>The Baz’</td>
</tr>
<tr>
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<td>Jack, Charlene</td>
</tr>
<tr>
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<td>Julian, Carissa</td>
</tr>
<tr>
<td>Overall Strategic Plan</td>
<td>EC and YCC</td>
</tr>
</tbody>
</table>
Developing a Plan for Virginia Local Section

NEXT STEPS
Performance Measurement Model

What resources did we apply?
- Money
- Staff
- Facilities
- Equipment

What did we do?
- Presentations
- Conferences
- Training
- Meetings
- Publications

What did we produce?
- # of presentations
- # of conferences
- # of participants

What effects did we have?
- New members
- New skills
- Different attitudes
- Modified behavior

What difference did it make?
- Direct/indirect
- Negative
- Positive
- Procedural
- Intended
- Unintended

Adapted from: Hatry, H.P. Performance measurement: Getting results (2006)
Research on Successful Plans and Goals Accomplishment

- Goal clarity and vision
- Planned and organized
- Time-bound
- Follow-through
- Importance
- Accountability
- Anticipation of barriers and risks
- Recovery plans
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
# Next Steps for Virginia LS Strategic Plan

<table>
<thead>
<tr>
<th>What</th>
<th>Who</th>
<th>When</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPR Attendees Receive Plan</td>
<td>Facilitators</td>
<td>Monday, 8/7</td>
<td>Report, slides</td>
</tr>
<tr>
<td>Project Leads and Teams Identified</td>
<td>Champions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sharing plan with relevant membership</td>
<td>Leads</td>
<td>9/1</td>
<td>email</td>
</tr>
<tr>
<td>Team members meet to finalize Project Plans</td>
<td>EC+SPR team</td>
<td>Early September 9/22</td>
<td>Select tracking syst.</td>
</tr>
<tr>
<td>KICK OFF</td>
<td>SPR teams</td>
<td>9/22</td>
<td>Have poster, table at section mtg.</td>
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Retreat Feedback

**Plus:**
- Informative, tools
- Comraderie, passion
- Expectations exceeded

**Delta:**
- Sunday AM is a challenge
- Input from more members
- Also need immediate problem-solving tools
- Make stickies electronic (Jamboard? Miro? Mural?)
Tracking Tools – “How To” links

How to make a timeline in Power Point
https://www.officetimeline.com/make-timeline/powerpoint#manually-make-powerpoint

How to make a timeline in Excel
https://www.officetimeline.com/make-timeline/excel

How to make a Gantt chart in 3 minutes
Gantt Chart Excel Tutorial - How to make a Basic Gantt Chart in Microsoft Excel 2016
Project Management Materials

• If you are interested in a quick overview of Project Management (PM), please take the self-directed Project Management 101 available at:

https://www.dropbox.com/s/849vsed03a3avgz/Project%20Management%20101%20FINAL.pdf?dl=0

Encourage your Project Leads and Teams to take Project Management 101; which emphasizes the 5 basic phases of PM

• If you or others are interested in a more detailed or in-depth treatment of Project Management, please see:

https://www.dropbox.com/s/s1y55lrk7wuu6pi/PROJECT%20MANAGEMENT%20FOR%20THE.%20NONPROFESSIONAL%20PM.pdf?dl=0
Virginia LS Strategic Plan*

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Core Values: Passion for chemistry, Focus on members, Professionalism, Safety, Ethics, DEIR

Vision: Empowering an Inclusive Community through Chemistry

Mission: Connecting and Engaging the Chemistry Community for a Sustainable Future

Virginia LS 2023 Dashboard

**Strengths**
- Engagement of Leaders 5
- Experience 3
- Finances 2
- Outreach 2

**Weaknesses**
- Engagement of Members 6
- Communication 2
- Succession Planning 2

**Opportunities**
- Technology/Communications
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