



REPORT
STRATEGIC PLANNING RETREAT
Southern Arizona Section (SAZACS)



July 29-30, 2023
Prepared by:
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American Chemical Society
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Executive Summary


This report contains results of a facilitated Strategic Planning Retreat (SPR) for the ACS Southern Arizona Local Section (SAZACS) held at Tucson, AZ on July 29-30, 2023. This is the first strategic plan for the local section using the Leadership Development System from ACS.

The body of this report presents key discussions and outcomes from the retreat, including final decisions and priorities, and addresses action plans. Pre-work results are in the Participant Guide Appendices that were emailed out before the retreat. A condensed and updated slide deck for Southern Arizona Local Section use has also been sent to the participants.

The participants developed a series of implementation plans around each goal strategy combination. These plans will be monitored and progress shared regularly with the executive committee and membership to ensure accountability. The goal is that this plan will be completed over the next 3-5 years.


The Strategic Plan for 2023-2027, developed during this retreat is:

Southern Arizona LS Strategic Plan*




Vision

Community engagement through chemistry



Mission

We support, inspire and engage all people in our diverse community in meeting the needs of today and tomorrow through chemistry




Goals & Strategies

Goal 1: Professional Development: Provide access to tools and resources to meet the professional needs of members.

G1S1: Workshops. By January 1, 2024, complete a survey of professional development interests to be used to plan 2024 workshops. I: M, R: L, Champion: Steve

G1S2: Mentorship. By January 1, 2024 recruit members to participate in a program to mentor early career chemists and students. I: M, R: L, Champion: Pat, Kara

G1S3: Industry Partnerships. Form a committee to investigate industry partnerships and report back to Exec. Comm by April 1, 2024. I: M, R: M Champion: Wendy



Goals & Strategies

Goal 2: Education Support: Provide resources to students, educators, and the community to expand understanding of chemistry.

G2S1: Student Resources. By August 2024, aggregate information on demonstrations and groups who do demonstrations; send out to SAZ schools. I: H, R: M Champion: Trina

G2S2: Teacher Resources. By June 2024, survey HS teachers to determine how to support them (workshops, materials, outreach...). I: M, R: M Champion: Grazyyna

G2S3: Communications. By August 2024, develop connections to disseminate SAZ information to Arizona HS teachers and colleges/universities. I: M, R: H/M Champion: Dee

Goal 3: Community Building: Foster engagement through communications, community involvement, and networking.

G3S1: Membership. Within 9 months, host social event (family picnic) for members to recruit new volunteers for the Section. I: H, R: M Champion: Chuck

G3S2: Communications/Social Media. Within 9 months, increase social media presence, release one newsletter, start Instagram, LinkedIn accounts, cross-post twice a month. I: M-H, R: H Champion: Ashleigh, Iman

G3S3: By August, 2024 host four regular member events. I: H, R: M-H Champion: Phil

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*As approved by XXX, date

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REPORT

1. Background

The Southern Arizona Local Section held a Strategic Planning Retreat in Tucson, AZ, at the University of Arizona on July 29-30, 2023. The retreat was facilitated, and used ACS LDS[®] methodology, as taught in the ACS Strategic Planning course, and was customized for SAZACS as a first-generation planning retreat. The planning methodology was reviewed with participants at the beginning of this workshop. Facilitators then guided participants in applying the strategic planning concepts to SAZACS' current situation. Facilitators were Bill Carroll and Barbara Sawrey

A team of members and collaborators participated in the retreat, as follows:

Dee Belle-Oudry	Pat Schumann
Kara Bitter	Trina Shartsis
Steven L. Brown	Chuck Weidner
Ashleigh Dahlstrom	Grazyna Zreda
Iman Daryael	
Wendy Hyatt	
Phil McBride	

The SAZACS local section is a small/medium section of the ACS. Specific areas that the executive committee were interested in included; engaging more of the ~300 members in section activities, rejuvenating interactions with industry and industrial members, and new programming ideas that would attract diverse demographic groups, particularly senior chemists and younger chemists..

SAZACS's strategic planning process started with information gathered in a pre-work survey sent to retreat invitees. This information was augmented by facilitator review of these background materials prior to the retreat. From pre-work, ideas were gathered on SAZACS stakeholders, vision, mission, strengths, weaknesses, opportunities, threats, and possible goals. This pre-work input was collated and made available to participants.

At the retreat, the facilitators began by asking participants their expectations for the retreat. Facilitators introduced the ACS Leadership Development System[®] Strategic Planning Process (documented in the Retreat Participant Guide). Planning process steps, in the order covered in the retreat included:

- ACS Strategic Planning Process and Terminology
- Developing a Strategic Plan: Stakeholders; Vision and Mission
- SWOT
 - Recognize Strengths and Weaknesses
 - Change Drivers (Opportunities and Threats)
- LS All-Member Survey review

- Goals Development
- Strategies Portfolio
 - Identify Potential Strategies (Brainstorm)
 - Down Select Strategies into themes/buckets
- Check Goal/Strategy statements vs. SMART criteria
- Opportunity Mapping
- Identification of Champions
- Critical Success Factors, Barriers to Success
- Developing Action Plans for Strategies
- Pitfalls
- Next Steps

The participants introduced themselves and told the group about their personal expectations for this retreat:

One Expectation of this Retreat



- Membership
- Goals
- Sustainability
- Communication
- Involvement
- Goals
- Engagement
- Connection
- Outreach
- Longevity
- Reconnection

With the preceding as context, facilitators presented the ACS Strategic Planning Process and the retreat flow for developing strategic plans, as outlined in the graphic below.

Strategic Planning Retreat Flow



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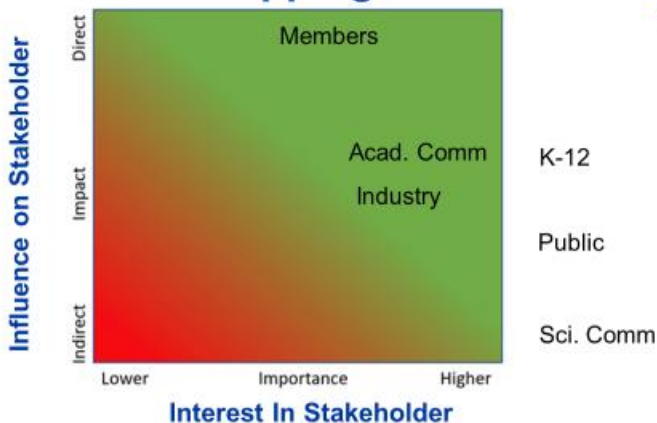
2. Stakeholders, Vision and Mission

a) Stakeholders

Stakeholder analysis is a useful tool to guide strategic planning and implementation. Although it's often used in developing mission statements, it can also be used as a check, to ensure that key stakeholders (i.e. those who are partners and those who are served) are addressed by the goals and strategies.

In pre-work respondents were asked "who are SAZACS's stakeholders?" The list of possible stakeholders was then ranked based on the pre-work statistics. Through discussion the participants ranked stakeholders based on the two dimensions of Influence and Interest. These were mapped as shown below and additional stakeholders were added based on this more nuanced view with the goal of focusing on those stakeholders in or near the top right quadrant.

Stakeholder Mapping



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b) Vision and Mission

At the retreat, facilitators reviewed the value and purpose of vision and mission statements. Next, facilitators presented SAZACS's pre-work input on proposed vision and mission statements provided in their programs guide. During subsequent discussion, retreat participants developed SAZACS's vision statement *de novo*. The resulting vision and mission statements are:

SAZACS Vision Statement 2023

Community engagement through chemistry

SAZACS Mission Statement 2023

We support, inspire, and engage all people in our diverse community in meeting the needs of today and tomorrow through chemistry

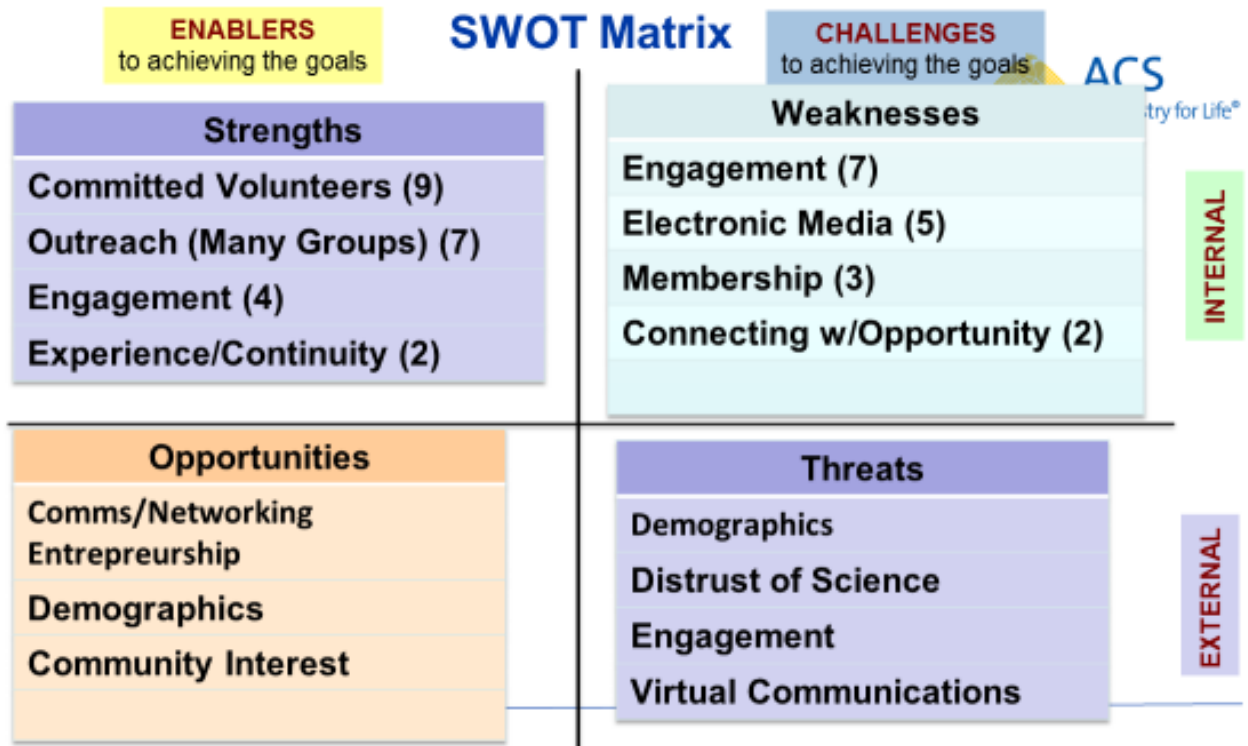
3. Current Situation

a) Process Overview

Facilitators led the participants in an analysis of SAZACS's current situation via Environment Scanning and Challenges/Opportunities exercises. An overview of the Society's Change Drivers (participant guide appendix) informed the process of determining environment trends with direct impact on SAZACS. These trends were then identified as threats, opportunities or both. Top strengths and weaknesses of SAZACS, described in the collated pre-work lists were considered and discussed.

b) SAZACS Environment Scan

Working as a group of the whole, the participants identified environment trends with significant potential impact on SAZACS. These significant trends were discussed along with a SWOT analysis. This is captured in the graphic below and will be captured in the strategic plan dashboard at the end.



4. Goals

a) Process Overview

Goals for the 2023 SAZACS Strategic Plan were discussed in context of the final SAZACS Vision and Mission statements as well as the SWOT analysis noted above and the pre-work ideas. Prior to finalizing the goal themes, the group reviewed the results of a SAZACS Local Section all member survey. The survey provided insights into areas that respondents felt were important including more diverse programming, more networking opportunities, and a mix of face to face and hybrid interactions.

Based on pre-work input, and recurring themes, three goal themes were identified by the group: Engage Members, Communication, and Inclusive Organization.

b) SAZACS Goals 2023-2027

Final Goal Statements



Goal 1: Professional Development: Provide access to tools and resources to meet the professional needs of members.

Goal 2: Education Support: Provide resources to students, educators, and the community to expand understanding of chemistry.

Goal 3: Community Building: Foster engagement through communications, community involvement, and networking.

5. Strategies

a) Process Overview

Participants developed a portfolio of strategies to achieve SAZACS's goals that were developed. A silent brainstorm by all participants was used to generate proposed implementation strategies for each goal. Breakout teams collated and sorted the ideas, grouping similar items into broader categories, and named the categories, and ranked those groupings for implementation. The three top strategies were identified for each goal. The total set of strategy ideas were captured in pictures/pdf files of the flip charts. These were sent separately to participants. Facilitators recommend that these remaining ideas be considered for later implementation after the initial strategies are successfully completed. After successfully completing chosen strategies this list can be used to choose additional strategies for implementation.

In small working groups, participants prepared strategy statements from the brainstorm categories information, then made them SMART, and ranked for impact and resources required. The full group reviewed, refined (as needed) and developed final goal/strategy statements for the 2023 Strategic Plan. Facilitators plotted the strategies on the Opportunity Map and triaged the most important strategies to implement first, given the resources available.

b) Results

Goal 1: Professional Development: Provide access to tools and resources to meet the professional needs of members.

G1S1: Workshops. By January 1, 2024, complete a survey of professional development interests to be used to plan 2024 workshops. I: M, R: L,

G1S2: Mentorship. By January 1, 2024 recruit members to participate in a program to mentor early career chemists and students. I:M, R:L

G1S3: Industry Partnerships. Form a committee to investigate industry partnerships and report back to Exec Comm by April 1, 2024. I: M, R: M

Goal 2: Education Support: Provide resources to students, educators, and the community to expand understanding of chemistry.

G2S1: Student Resources. By August 2024, aggregate information on demonstrations and groups who do demonstrations; send out to SAZ schools. I:H, R:M

G2S2: Teacher Resources. By June 2024, survey HS teachers to determine how to support them (workshops, materials, outreach...). I:M, R:M

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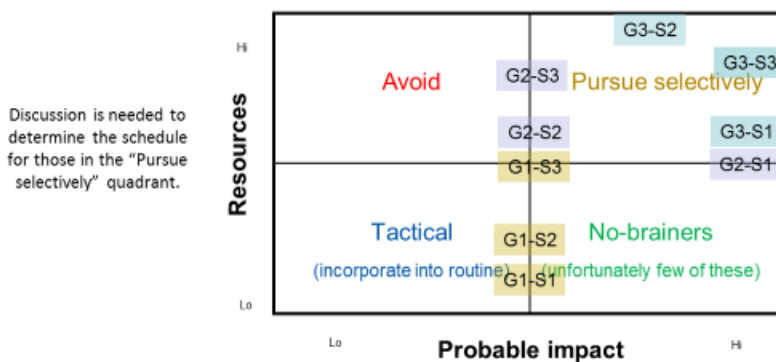
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G3S3: By August, 2024 host four regular member events. I: H, R: M-H

Opportunity Map For Southern Arizona LS




Several of SAZACS’s goal/strategies fall in or border the “No-brainer” quadrant, and thus should be considered for immediate implementation. Three require Medium resources; four have High probable impact.

Facilitators encourage the SAZACS leadership team to continue discussion based on the observations immediately above. Evaluate resource requirements and SAZACS’s total implementation capacity (e.g. people, time, financial and other resources) and consider phased implementation as needed to ensure successful completion of these nine goal/strategies. This can be accomplished by adjusting target dates and staggering start dates as needed to ensure success.


The SAZACS 2023 Strategic Plan developed during this retreat is shown below.

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6. 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.



Strategic Plan Champions



Goal/Strategy	Champion
Goal 1, Strategy 1	Steve
Goal 1, Strategy 2	Pat and Kara
Goal 1, Strategy 3	Wendy
Goal 2, Strategy 1	Trina
Goal 2, Strategy 2	Grazyna
Goal 2, Strategy 3	Dee
Goal 3, Strategy 1	Chuck
Goal 3, Strategy 2	Ashleigh and Iman
Goal 3, Strategy 3	Phil
Overall Strategic Plan	Exec. Committee

b) Project Plans

Facilitators explained the importance of establishing measures to track progress and understand effectiveness of the Plan. They described a performance measurement model and explained how measures are developed. Small teams led by the Champions then spent time starting development of action plans for their goal/strategy using the project plan template provided. Refined action plans were or will soon be electronically entered into the plan template and immediately forwarded to the SAZACS Strategic Planning Team.

c) Pitfalls

Section members discussed key factors for successful implementation based on research and experience. Below are potential pitfalls to avoid during implementation, including:

Other pitfalls include:

- Not involving other members
- Not getting buy-in from the membership
- Measuring activities instead of results
- Not developing timelines and milestones
- Not developing detailed action plans
- Trying to do it all yourself

- No follow-up/thru between meetings
- Not using volunteers' motivations when engaging volunteers for their skills
- Not monitoring the progress
- Not celebrating successes

d) Next Steps

- e) Actions identified to ensure the successful launch of the SAZACS Strategic Plan resulted in the following next steps list, with target dates for each action. A kickoff date of April 1, 2023, this would follow discussions, input, and approval by the Executive Committee at their March 9th meeting. Additional next steps are included in the chart below:

Next Steps for Southern Arizona LS Strategic Plan



What	Who	When	Comments
SPR Attendees Receive Plan	Facilitators	This Week	
Approval/Buy In of Strategic Plan by Southern Arizona LS	Exec Comm	Aug 22	
Project Leads and Teams Identified	Champions	Sep 1	
Set up project management and accountability system	Wendy	Sep 1	
Final Project Plans done	Champions	Aug 22	
Set up Central Repository for Project Plans	Chuck	Done	Shared Google drive
Set Up Project Management Accountability/Status Update Schedule	Exec Comm	3 rd qtr	



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7. Wrap Up/Evaluation

Facilitators returned to the group's expectation list (See flipcharts, Day 1), and it was noted that expectations had been met, including having fun. There was also thanks for Ivona and the leadership team that organized the event. The group then provided real-time feedback on the retreat and identified the following areas of success and opportunities for improvement.

Retreat Feedback



- Bill's stories
- Starting with mission, vision, and stakeholders
- Seeing the relationship with the national ACS SP
- Focus on "why", not just how



- Some wanted more group work, others not
- Wished to have two people working on the project plan for each strategy
- Some liked rotating through all three goals, others wanted to stick with one goal from start to finish
- Would like to be reminded that when setting priorities for new programs, they need to weigh against all ongoing programs.



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The Facilitators closed by thanking the team for a productive discussion. The future of SAZACS and this plan is in their hands. They own this plan and we wish them the best of success as they work toward achieving their Mission and Vision for the SAZACS Local Section.