



## **REPORT**

# **STRATEGIC PLANNING RETREAT ACS Polymer Division (POLY)**

**Jan. 26 & 27, 2018**

**Prepared for:**

**The POLY Division Leadership Team**

**By**

**Larry Krannich and Kathleen Schulz**

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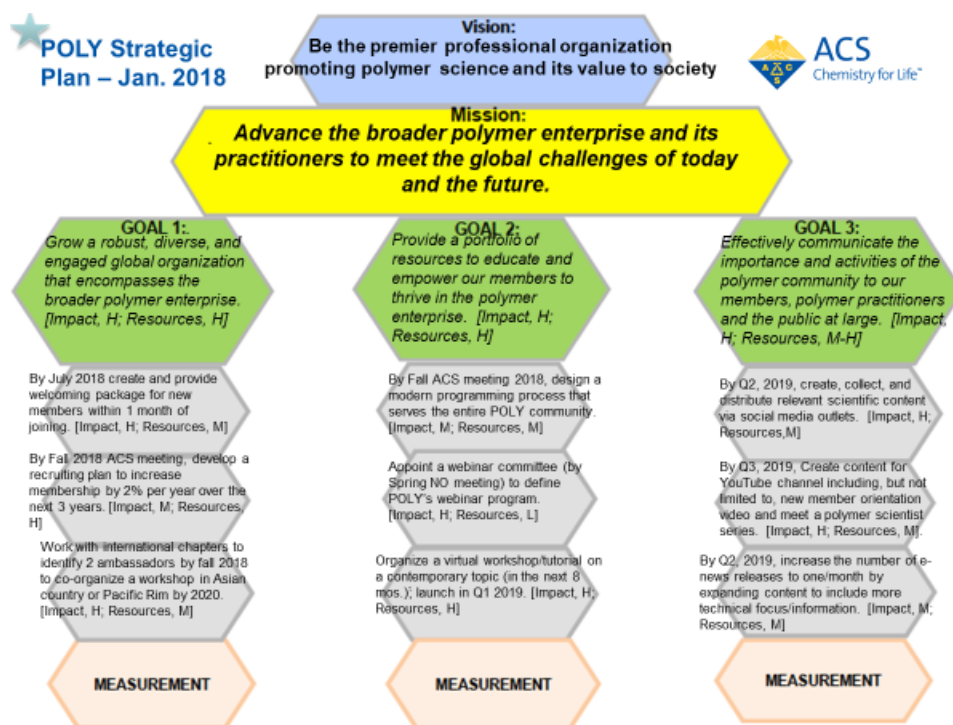
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## Executive Summary

This report contains results of a facilitated second generation Strategic Planning Retreat (SPR) for the ACS Polymer Division (POLY) held in San Antonio, TX on January 26-27, 2018.

The body of this report presents key discussions and outcomes from the retreat, including final decisions and priorities, and addresses action plans. Some materials were provided by email immediately following the retreat: a summary report of key Strategic Plan elements, pdf files of flipcharts of retreat breakout group discussions, and slides showing outputs from the retreat. Other materials generated during the retreat are included in the Appendices of this report. Pre-work results are in the Participant Guide Appendices and were also sent via email prior to the retreat. An expanded and updated slide deck accompanies this report.

The POLY Strategic Plan for 2018-2023, developed during this retreat is:



# REPORT

## 1. Background

The ACS Polymer Division (POLY) held a Strategic Planning Retreat in San Antonio, TX, on Jan 26-27, 2018. The retreat was facilitated, and used ACS LDS™ methodology, as taught in the ACS Strategic Planning Workshop, and was customized for POLY's second 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 POLY's current situation. Facilitators were Larry Krannich and Kathleen Schulz.

Nineteen people from POLY participated in the retreat, as follows:

### *Retreat Participants*

Travis Baughman	Lesia Linkous Pristas
Erik Berda	Corinne Lipscomb
Kevin Cavicchi	Joe Mabry*
HN Cheng*	Michael Meador
Johan Foster	Mary Ann Meador
Diana Gerbi	Kathy Mitchem
Karl Haider	Sarah Morgan
Marc Hillymer	Toby Nelson
Michael Hunt	Derek Patton
Justin Kennemur	Greg Tew
Christine Landry-Coltrain	

\*Invited, unable to attend

## 2. Approach

POLY's Strategic Plan developed in 2013 used the then recently adopted ACS Strategic Planning framework to establish mission, vision, goals and strategies for execution in the ensuing 3-5 year period. Current leaders recognized that it had been five years since their last formal planning session, that the external environment has changed, and that the POLY leadership team now includes members who did not participate in development of the 2013 plan. Therefore, they felt it was time to update the POLY plan to ensure continued division success.

POLY's strategic planning process started with information gathered in a pre-work survey sent to retreat invitees and selected others prior to the planning retreat. This information was augmented by facilitator study of background materials provided by the division prior to the retreat, including the 2013 POLY Strategic Plan. Other pre-retreat preparations included phone calls between the POLY retreat planning team and facilitators, and assessment of the status of progress on the 2013 plan, led by the POLY Business Office. From pre-work, ideas were gathered on POLY stakeholders, vision, mission, strengths, weaknesses, critical success factors and barriers to success. This pre-work input was collated and sent to participants prior to the retreat. A member survey was conducted by POLY and the results sent to participants early the week of the retreat.

At the retreat, the facilitators began by asking participants their expectations for the retreat and the strategic planning process, reviewed status of progress on the POLY 2013 plan, led participants through a strategic retrospective discussion, presented the ACS Leadership Development System™ Strategic Planning Process (documented in the Retreat Participant Guide), and facilitated development of POLY's second generation strategic plan. Planning process steps, in the order covered in the retreat, were:

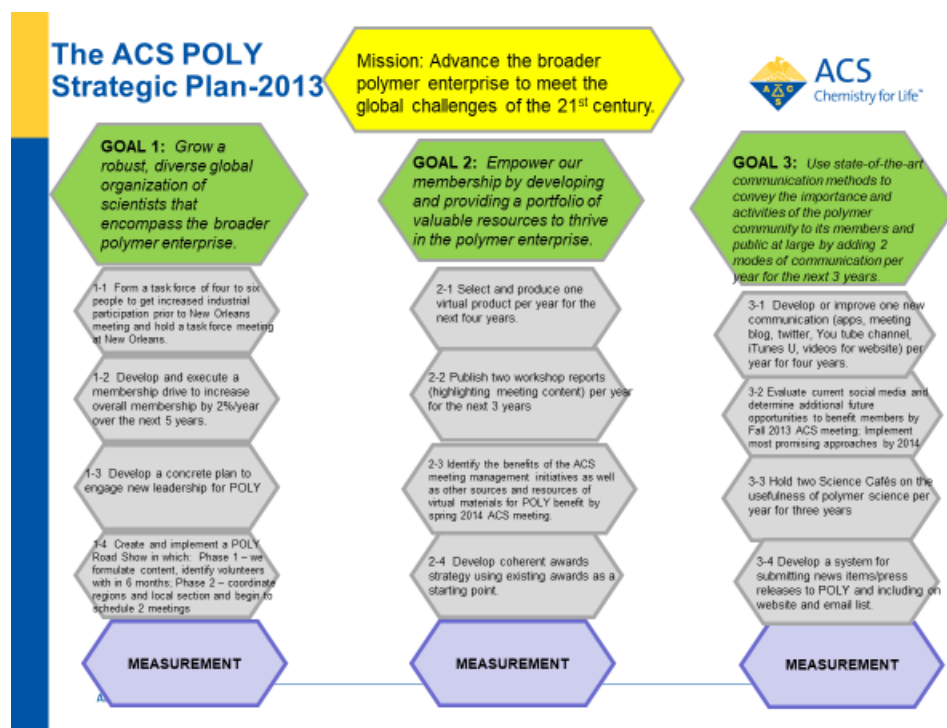
- Strategic Planning Overview
  - POLY 2013 Plan Outcomes – Progress Report
  - ACS Strategic Planning Process and Terminology
  - Strategic Retrospective
- Developing an Updated Plan: Stakeholders; Vision and Mission Review
  - Stakeholder Analysis
  - POLY Vision – Review/Confirm
  - POLY Mission – Review/Update
- Goals Review/Update
  - Current Goals – Review/Retain
  - Identify New Goals
  - Check vs. SMART Criteria
  - Prioritize

- Environmental Scan (STEP), Challenges and Opportunities (TOWS)
  - Identify Environment Trends (STEP)
  - Recognize Strengths and Weaknesses
  - Align Barriers and Weaknesses
  - Align Critical Success Factors vis a vis Strengths
  - Identify Threats and Opportunities
- Strategies Portfolio
  - Identify Potential Strategies (Brainstorm)
  - Down Select Strategies (Weighted vote)
  - Check Goal/Strategy statements vs. SMART criteria
  - Opportunity Mapping
  - Identification of Champions
- Implementation Planning
  - Establishing measures
  - Developing Action Plans for Strategies
  - Pitfalls
  - Next Steps
- Review and Wrap Up
  - Plus/Deltas Discussion
  - Retreat Written Evaluation

a) Overview of Previous Strategic Plan

Facilitators began the strategic planning process with a retrospective look at POLY's current Strategic Plan (below) and its implementation status.

This 2013 Strategic Plan includes Vision and Mission statements, three Goals and twelve associated implementation strategies.



The status of implementation of the 2013 POLY goals and strategies is shown in the table below.

To summarize:

- Goal 1, Strategies 1 and 3, completed. Recommend retain Goal 1, carry forward Strategies 1,2, and 3; discontinue Strategy 4.
- Goal 2, Strategies 1-4 complete or nearing completion. Recommend retain/modify Goal 2, carry forward Strategies 1,3, and 4.
- Goal 3: Strategies 1-4 complete. Recommend retain/modify Goal 3, carry forward Strategies 1-4.

## Status of 2013 Strategic Plan Goals and Strategies (Appendix Q) [As of 12/15/2017]



Please indicate status with an X in the appropriate column for each Goal and Goal/Strategy described above

SP Element	Status				Comments
	Complete	Nearing Completion	Carry Forward to 2018	Not Completed	
<b>Goal 1 GROWTH</b>					
Strategy 1 Industrial	X		X		Continue and add new initiatives
Strategy 2 Membership			X	X	New goals, review value, reach others
Strategy 3 Leadership	X				Continue and new strategy for future
Strategy 4 Road Show				X	Discontinue
<b>Goal 2 MEMBERSHIP RESOURCE</b>					
Strategy 1 Virtual Product	X		X		Continue and add new initiatives
Strategy 2 Workshop Rpts	X				Discuss value of current product
Strategy 3 ACS – Virtual	X		X		Continue and add new initiatives
Strategy 4 Awards		X			Continue but fine tune procedures
<b>Goal 3 COMMUNICATION</b>					
Strategy 1&2 Communication	X		X		Continue and add new initiatives
Strategy 3 Science Cafés	X		X		Continue
Strategy 4 Press/Notices	X		X		Continue and find volunteers

### a) Strategic Retrospective

To prepare POLY's roadmap for the next 3-5 years, the facilitators pointed out that a good way to move forward is to build on past successes, recognize what we want to do better and capture ideas to make changes. SPR participants were asked for feedback in these areas on the pre-work survey. Facilitators collated, categorized and organized the survey results and sent them to the SPR participants prior to the retreat.

The Pre-work survey asked these reflective questions:

- RETROSPECTIVE SECTION I: WHAT HAS GONE VERY WELL?**  
 What do you consider POLY's top 3 successes with the 2013 Strategic Plan?
- RETROSPECTIVE SECTION II: WHAT HAS GONE NOT AS WELL?**  
 What do you consider to be POLY's top 3 areas that could have gone better?
- RETROSPECTIVE SECTION III: WHAT WOULD YOU LIKE TO DO DIFFERENTLY?**  
 What are top 3 ideas for change you would propose as POLY goes forward?

Categorized and summarized responses to these questions are presented in the graphics below. The details are in Appendices D, E and F of the Retreat Participant Guide (PG).



## Went Especially Well in 2013 Strategic Plan (See Appendix D)



- **Industrial Activities (Goal 2)**
- **Virtual Products (Goal 2)**
- **New Leadership Engagement (Goal 1)**
- **Member Retention ( Goal 1)**

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## Areas that Could Have Gone Better (See Appendix E)



- **Membership Recruitment/Retention (Goal 1)**
- **Addressing Member Value Proposition (Goals 2 & 3 )**
- **Product/Programming (Goal 2)**
- **Membership Diversity (Goal 1)**

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## Changes/Emphases Going Forward (See Appendix F)



- Addressing Membership Value (Goal 2)
- Diversify Engaged Members (Goals 2 & 3)
- Division Governance (Goal 1)
- Virtual Products (Goal 2)
- Membership Recruitment (Goal 1)
- Programming (Goal 2)
- Identifying Award Nominees (Goal 2)

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Facilitators correlated these retrospective elements using the graphic below. During discussion, they highlighted the general tendency to focus on improving the things that didn't go as well. They pointed out that building on successes is a more effective approach in strategy implementation, unless some area that didn't go as well indicates a critical flaw. In such cases, the critical flaw(s) *must* be addressed in strategy implementation.

## Correlation of Retrospective Look (Goals in Parentheses)

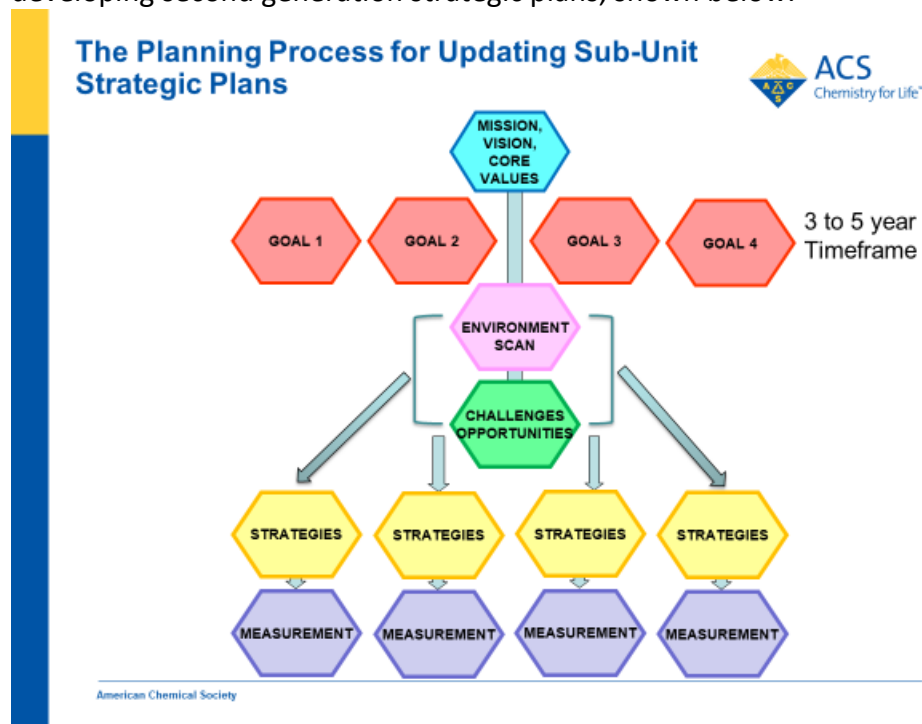


Went Well	Went Not so Well	Change/Emphasize Going Forward
Industrial Activities (2)		
Virtual Products (2)	Products/Programming	Virtual Products, Programming
New Leadership Engagement (1)		
Member Retention (1)	Member Recruitment & Retention	Membership Recruitment
	Member Value Proposition (2&3)	Addressing Membership Value
	Membership Diversity (1)	Diversify Engaged Members
		Division Governance (1)
		ID Award Nominees (2)

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## b) Strategic Planning Process

With the preceding as context, facilitators presented the ACS Strategic Planning Process for developing second generation strategic plans, shown below.



## 3. 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 primarily served) are addressed by all goals and strategies.

In pre-work respondents were asked "who are POLY's stakeholders?" The list of possible stakeholders from pre-work (see Participant Guide, Appendix G) was then used to identify primary POLY stakeholders through discussion in two dimensions: (1) stakeholder relationship to POLY, characterized as "Direct" or "Indirect", and (2) priority, defined as 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

Based on this discussion, the following “direct impact” stakeholders were identified and classified as mission critical for POLY (i.e. “Direct”, priority 1):

- POLY members D/1
- Students D/1
- Polymer Professionals D/1

Other significant stakeholders:

- POLY leaders D/2

## b) Vision and Mission

At the retreat, facilitators reviewed the value and purpose of vision and mission statements, presented POLY’s current vision and mission statements, and compared POLY’s statements to examples and templates. Next, facilitators presented POLY’s pre-work input on proposed vision and mission statements (see Appendices H and I, PG). During subsequent discussion, retreat participants confirmed the current wording for POLY’s vision statement and modified the POLY mission statement. The resulting vision and mission statements are:

### ***POLY Vision Statement – January, 2018***

Be the premier professional organization promoting polymer science and its value to society.

### ***POLY Mission Statement – January, 2018***

Advance the broader polymer enterprise and its practitioners to meet the global challenges of today and the future.

## 4. Goals

### a) Process Overview

Goals for the 2018 POLY Strategic Plan were discussed in context of the final POLY Vision and Mission statements noted above. This discussion was based on pre-work ideas for goals, and the retrospective analysis of the 2013 POLY Strategic Plan, including ideas for changes in direction and emphasis.

As previously noted in this report, Goals 1-3 were retained, with some modification. Based on pre-work input, three additional goal themes were considered: Communication, Education and Recruitment/Retention. Eight additional goal suggestions were made, but not considered, as they were each mentioned only once in pre-work. On further discussion, participants decided to combine goal ideas from these three themes with lists of pre-work ideas for Goals 1-3, as follows: “Communicate” goal ideas to Goal 3, “Education” goal ideas to Goal 1 and “Recruitment/Retention” goal ideas into Goal 1. Participants formed small groups and developed proposed new, SMART Goal 1-3 statements from the ideas lists (See SMART criteria in PG). The full group reviewed, discussed and modified the proposed goals as needed. Each goal 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.

### b) Results

#### i. POLY 2018-2023 Goals

## POLY Goals

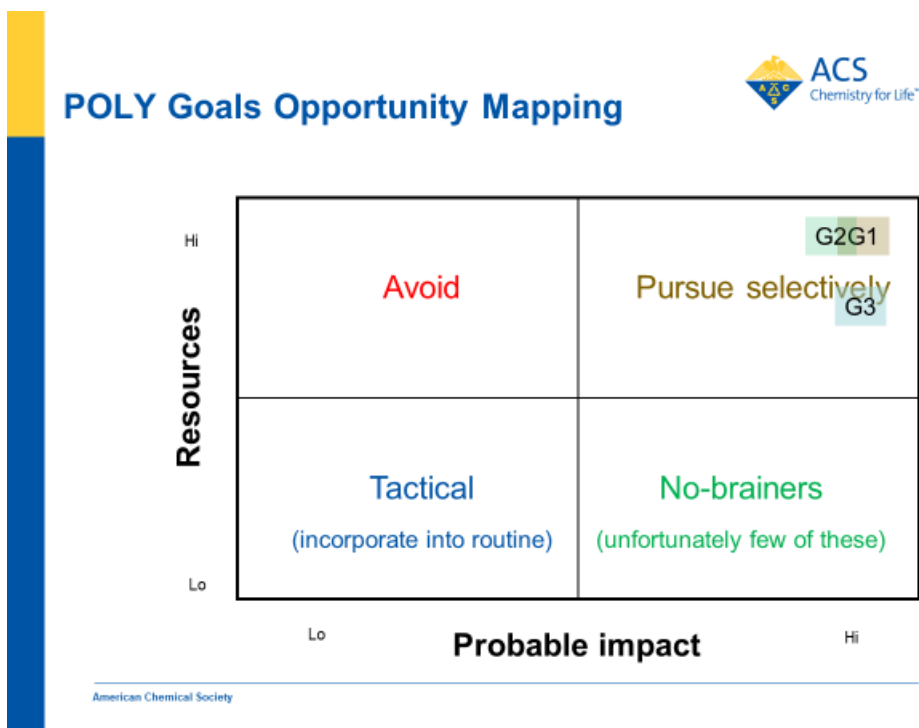


**Goal 1:** *Grow a robust, diverse, and engaged global organization that encompasses the broader polymer enterprise. [Impact, H; Resources, H]*

**Goal 2:** *Provide a portfolio of resources to educate and empower our members to thrive in the polymer enterprise. [Impact, H; Resources, H]*

**Goal 3:** *Effectively communicate the importance and activities of the polymer community to our members, polymer practitioners and the public at large. [Impact, H; Resources, M-H]*

ii. POLY Goals Opportunity Map



This opportunity map shows that all three POLY goals are high impact, with high or medium-high resource requirements, placing them all in the Pursue Selectively category. Facilitators, however, noted that decisions on how many goals are feasible to implement with existing POLY resources can't be made at his stage, as opportunity maps created after potential strategies are developed often do separate goal/strategy combinations into different quadrants on the map, making implementation more manageable.

## 5. Current Situation

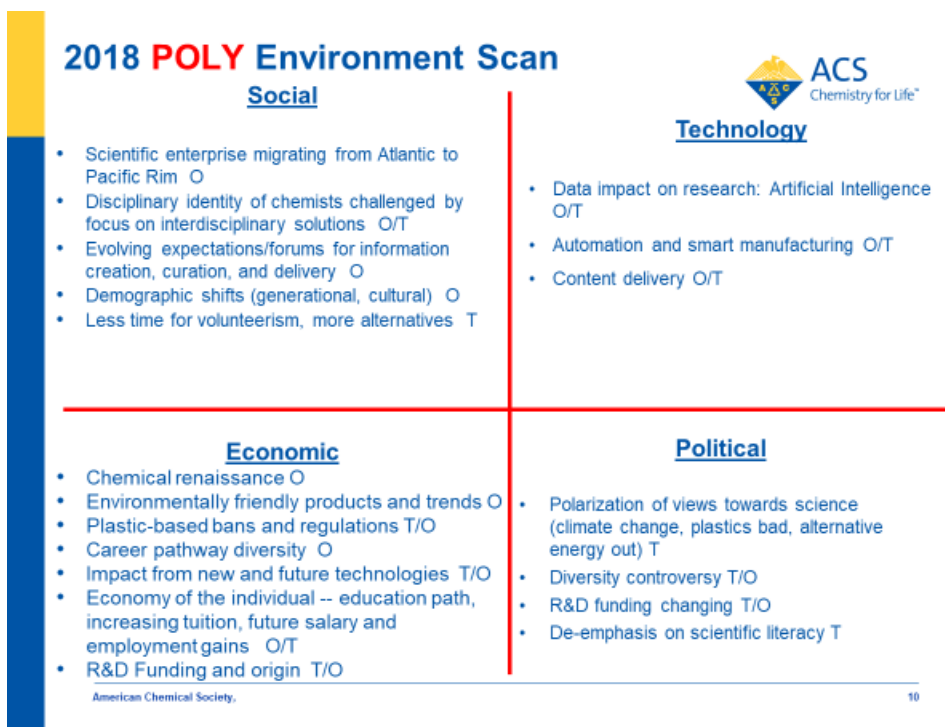
### a) Process Overview

After developing the three SMART goals, facilitators led the participants in an analysis of POLY's current situation via Environment Scan (STEP) and Challenges/Opportunities (TOWS) exercises. An overview of the Society's 2018 EScan and Change Drivers (Appendix P, PG) informed the process of determining environment trends with direct impact on POLY. These were then identified as Threats, Opportunities or Both. Top strengths and weaknesses of POLY, as well as Critical Success Factors and Barriers to Success (Appendices M and N, PG) described in the collated pre-work lists (Appendices K-M, PG) were considered and discussed. A comparison of key strengths to critical success factors, and top weaknesses to barriers to success provide important information to guide POLY's strategic implementation.

b) Results

i. POLY Environment Scan

Working in four breakout groups, the participants identified environment trends with significant potential impact on POLY, using the STEP taxonomy: Social, Technology, Economic, Political. These significant trends are shown in the graphic below.



In large group discussion, participants designated each of the trends in the Environment Scan above as a challenge/threat or opportunity to accomplishment of POLY's goals, using the designations: T= Threat or Challenge, O=Opportunity, T/O=Both.

ii. Challenges and Opportunities Analysis (TOWS)

One half of the TOWS matrix was finalized through facilitated discussion of participants' pre-work lists of POLY's strengths and weaknesses (Appendices K and L, PG), as shown below.

The graphic displays a TOWS Matrix for POLY. It features a blue star icon in the top left corner. The title is "TOWS Matrix for POLY" with a subtitle "(See Appendices K & L) [Any Critical Flaws?]". The ACS logo is in the top right. The matrix is divided into two columns: "Weaknesses" and "Strengths". The Weaknesses column lists: 1. Value Proposition, 2. Recruitment/Retention, 3. Member Engagement, and 4. Exclusive Community. The Strengths column lists: 1. Programming, 2. POLY Leadership, 3. POLY Members, 4. Business Office, 5. Innovation, and 6. Outreach. The American Chemical Society logo is at the bottom left.

**TOWS Matrix for POLY**  
(See Appendices K & L) [Any **Critical Flaws?**]

**Weaknesses**

1. Value Proposition
2. Recruitment/Retention
3. Member Engagement
4. Exclusive Community

**Strengths**

1. Programming
2. POLY Leadership
3. POLY Members
4. Business Office
5. Innovation
6. Outreach


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The other half of the TOWS matrix 4- quadrant format shown in PG can be constructed by similarly listing Threats and Opportunities from the Environment Scan into two columns.



iii. Critical Success Factors and Barriers

POLY's final lists of strengths and weaknesses were used to recognize critical success factors and barriers to successful implementation of a POLY Strategic Plan. Facilitators noted good correlation between the key strengths and success factors critical to implementing POLY's goals (i.e., CSFs), and between key weaknesses and barriers to implementation, as shown in the graphics below.


 **TOWS Matrix for POLY**  
(See Appendices K & M) [Any Critical Flaws?]



POLY Strengths	POLY Critical Success Factors
<ol style="list-style-type: none"><li>1. <b>Programming</b></li><li>2. <b>POLY Leadership</b></li><li>3. <b>POLY Members</b></li><li>4. <b>Business Office</b></li><li>5. <b>Innovation</b></li><li>6. <b>Outreach</b></li></ol>	<ol style="list-style-type: none"><li>1. <b>Premier Programming/ Activities</b></li><li>2. <b>Recruitment/ Retention</b></li><li>3. <b>Value Proposition</b></li><li>4. <b>Member Engagement</b></li><li>5. <b>Business Office</b></li><li>6. <b>Engaged Leadership</b></li></ol>

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**Comparison of POLY Weaknesses & Barriers to POLY Success** (Appendices L & N)



POLY Weaknesses	Barriers to POLY Success
<ol style="list-style-type: none"><li>1. <b>Value Proposition</b></li><li>2. <b>Recruitment/Retention</b></li><li>3. <b>Member Engagement</b></li><li>4. <b>Exclusive Community</b></li></ol>	<ol style="list-style-type: none"><li>1. <b>Evolving Community</b></li><li>2. <b>Limited use of Investments</b></li><li>3. <b>Recruitment/Retention</b></li><li>4. <b>Organization Competition</b></li><li>5. <b>Leadership</b></li><li>6. <b>Time Commitment</b></li><li>7. <b>Volunteer Retention</b></li></ol>

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## 6. Strategies

### a) Process Overview

Next, participants considered and developed a portfolio of strategies to implement POLY's chosen 2018-2023 plan goals. Participants were encouraged to consider the following in developing proposed strategies for the three POLY goals: definition from the strategic planning process framework; pre-work compilations of Successes, Do Betters and Emphases going forward, as discussed in the Retrospective analysis; Strengths and Critical Success Factors; and potential Barriers, Challenges and Opportunities identified in the Environment Scan.

A silent brainstorm by all participants was then 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. Using a weighted vote, three top strategies were identified for each goal, for focus in the initial year(s) of the POLY 2018 strategic plan. These and the remaining strategy ideas were captured in pictures/pdf files of the flip charts, which 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 strategies chosen for 2017-2018, 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, ranked for impact and resources required. The full group reviewed, refined (as needed) and developed final goal/strategy statements for the 2018 Strategic Plan. Facilitators plotted the strategies on the Opportunity Map and noted that, indeed, when strategies were considered the goal/strategy map separated them into various quadrants, making implementation manageable (i.e., not all "Pursue Selectively" quadrant).

b) Results

i. POLY 2018-2019 Goal/Strategies Statements

**Goal 1.** *Grow a robust, diverse, and engaged global organization that encompasses the broader polymer enterprise. [Impact, H; Resources, H]*

Strategy 1: By July 2018, create and provide a welcoming package to provide to new members within 1 month of joining. [Impact, H; Resources, M] Champion: D. Gerbi.

Strategy 2: By Fall 2018 ACS meeting, develop a recruiting plan to increase membership by 2% per year over the next 3 years. [Impact, M; Resources, H]. Champion: K. Cavicchi.

Strategy 3: Work with international chapters to identify 2 ambassadors by fall 2018, to co-organize a workshop in Asian country or Pacific Rim by 2020. [Impact, H; Resources, M]. Champion: M. Meador.

**Goal 2:** *Provide a portfolio of resources to educate and empower our members to thrive in the polymer enterprise. [Impact, H; Resources, H]*

Strategy 1: By Fall ACS meeting 2018, design a modern programming process that serves the entire POLY community. [Impact, M; Resources, M]. Champion: C. Lipscomb/ S. Morgan.

Strategy 2: Appoint a webinar committee (by Spring 2018 NOLA meeting) to define POLY's webinar program. [Impact, H; Resources, L]. Champion: M. Hillymer.

Strategy 3: Organize a virtual workshop/tutorial on a contemporary topic (in the next 8 months; launch in Q1 2019). [Impact, H; Resources, H]. Champion: M. Hillymer/T. Nelson.

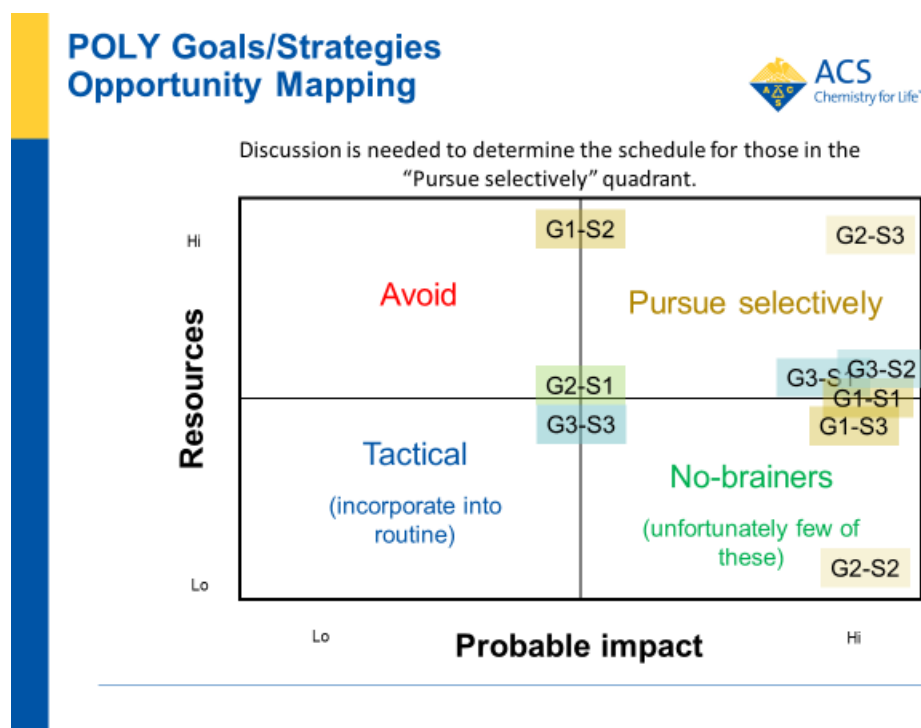
**Goal 3.** *Effectively communicate the importance and activities of the polymer community to our members, polymer practitioners and the public at large. [Impact, H; Resources, M-H]*

Strategy 1. By Q2, 2019, create, collect, and distribute relevant scientific content via social media outlets. [Impact, H; Resources, M]. Champion: J. Foster/D. Patton.

Strategy 2: By Q3, 2019, Create content for YouTube channel including, but not limited to, new member orientation video and meet a polymer scientist series. [Impact, H; Resources, M]. Champion: J. Kennemur/E. Berda.

Strategy 3: By Q2, 2019, Increase the number of e-news releases to one/month by expanding content to include more technical focus/information. [Impact, M; Resources, M]. Champion: M.A. Meador/K. Haider.

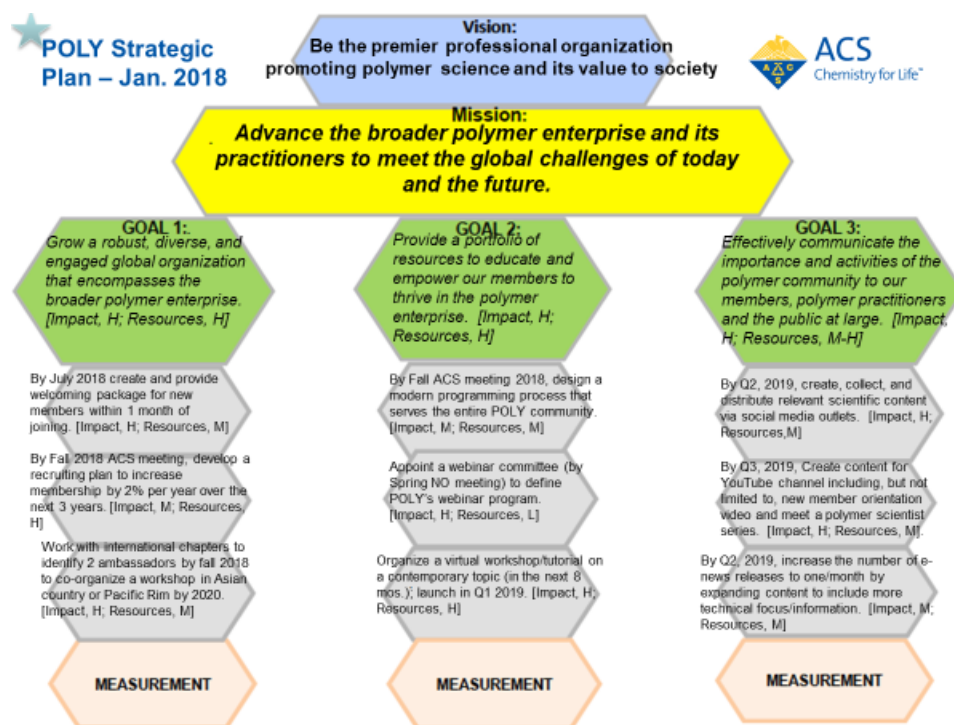
i. POLY Goal/Strategies Opportunity Map



One of POLY's goal/strategies (G2-S2) falls in the "No-brainer" quadrant, and thus should be considered for immediate implementation. Six require Medium resources; four of these have high probable impact (G3-S2, G1-S1, G1-S-3, G3-S1) and two have medium probable impact (G2-S1, G3-S3). Other things being equal, if POLY needs to make choices about which to implement first, the four with high probable impact (G1-S2 and G2-S3) should be considered first. Two goal/strategies have high probable impact (G1-S2 and G2-S3). Similarly, G2-S3, with higher probable impact might be considered for implementation before G1-S2, if choices must be made.

***Facilitators encourage the POLY leadership team to continue discussion based on the observations immediately above. Evaluate resource requirements and POLY'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 2018-2019 target dates and staggering start dates as needed to ensure success.***

The POLY 2018 Strategic Plan developed during this retreat is shown below and in the Executive Summary of this report.



## 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) what is the 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, and the latter two elements (#2 and 3, 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.

## ★ POLY Strategic Plan Champions



What	Champion
Goal 1, Strategy 1	Diana Gerbi
Goal 1, Strategy 2	Kevin Cavicchi
Goal 1, Strategy 3	Michael Meador
Goal 2, Strategy 1	Corinne Lipscomb/Sarah Morgan
Goal 2, Strategy 2	Marc Hillymer
Goal 2, Strategy 3	Marc Hillymer/Toby Nelson
Goal 3, Strategy 1	Johan Foster/Derek Patton
Goal 3, Strategy 2	Justin Kennemur/Erik Berda
Goal 3, Strategy 3	Mary Ann Meador/Karl Haider
<b>POLY Strategic Plan</b>	Diana/Sarah/Michael

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### 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 developing action plans for their goal/strategy using the project plan template provided (Appendix B, PG). In the debrief of this activity, several participants reported their plans to the full group for critique and discussion. This resulted in refinements and beneficial “cross talk” which identified tactical ideas, collaborative and cooperative opportunities. The refined action plans were electronically entered into the plan template and immediately forwarded to the POLY Business Office.

### c) Pitfalls

Facilitators presented key factors for successful implementation based on research and experience and noted potential pitfalls to avoid, including:

- Trying to do it all yourself; not delegating
- No accountability system (timeline/reminders)
- Not assessing and managing available time
- Not involving other Division members
- Not getting buy-in from the Division
- 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

In addition, the group identified another pitfall for POLY: not accurately identifying/estimating resources.

#### d) Next Steps

Actions identified to ensure the successful launch of the POLY Strategic Plan resulted in the following next steps list, with target dates for each action. A kickoff date of March 18, 2018 was set.



### POLY Next Steps



#### KICK OFF: March 18, 2018

What	When	Who
POLY Receives Plan		Kathleen/Larry
Rough Project Plans Submitted	1/27/18	Champions
Communicate with Ex Com	1/27/18	
SP Approval	3/18/18	
Kick Off	3/18/18	
Plan placed on website	TBD	
Notify POLY membership	6/18	
Project leads and teams chosen	3/18/18	Champions
Project teams begin work	3/18/18	
Status Review at Quarterly mtgs	Quarterly	Oversight Champions
Annual SP report	1/19	
*See PG Appendix B for Worksheets		

## 8. Wrap Up/Evaluation

Facilitators returned to the group's expectation list (See flipcharts, Day 1), and it was noted that expectations had been met. The group then completed written evaluations and provided real-time feedback on the retreat, ranking it ~4.5/5 on a 1-5 scale (5 highest), and identified the following Plus/Deltas list, where "Plus" = Went Very Well and "Delta"= Improvement Suggestions.

### Overall Retreat Feedback

4.5/5 ranking

#### Headlines/What Went Very Well

- Strategies Post-it brainstorm
- Pre-work useful
- Identifying Champions
- Enforcement of 80/20 rule
- Structured SPR process



#### What Would You Do Differently

- EScan broke the flow
- Young members not represented
- Explain PG contents
- Time restrictions (=strategy restrictions?)
- Didn't discuss membership survey



## **APPENDIX**

***(See Separate Document)***