

**SDE- GWIS Strategic Plan-Final
FY 2007—2012
November 1, 2007**

Strategic planning is fundamentally concerned with the allocation of resources toward the achievement, over time, of institutional goals, or stated differently, targeted objectives and action plans to move from where we are to where we want to be.

In that vein, we present this inaugural strategic plan in its first draft, which is the joint effort of Paddy Wiesenfeld, National President and Dee McManus, Chairman of the Board of Directors. We are submitting it to the Executive Board, appropriate Committee Chairs, and the Board of Directors for their constituent input. Once completed, the Strategic Plan will then be presented to the National Council on June 15, 2007 for approval to implement.

Executive Summary

Vision: To grow and strengthen the National SDE-GWIS Organization through non-fellowships programs, seizing opportunities for leadership development and training, membership recruitment, administrative and technological improvements, fund raising, and enhanced communications. This strategic plan defines the roadmap for the short-term (1-year) and the long-term (5-year) future of the National SDE-GWIS Organization.

Rationale: Strategic planning identifies the difference between where we are (current status) and where we want to be (visions and goals) and how we can get there (objectives and action plans). In the past SDE-GWIS has managed only to respond to the immediate needs of the organization, usually on an annual basis, without providing leadership for the future. By identifying a strategic roadmap, we hope to provide a vision that will increase the growth and depth of the organization, while developing a pool of experienced and qualified leaders to move us from a reactive mode to a more thoughtful proactive planning process.

Challenges: After self assessment of our organization, we have determined the critical challenges for the GWIS future are these:

- 1) To identify and develop the leaders of tomorrow to supersede the leaders of today;
- 2) To expand and sustain a balanced membership and programs;
- 3) To gain greater efficiencies in our administrative processes and to become technologically savvy while maintaining our mission;
- 4) To grow our operating funds to sustain existing non-fellowships programs (e.g. Travel Awards, New Chapter Start-up Funds, New Leadership Award, enhanced marketing, paid positions for leadership and technology training, etc.) and to develop new programs as the need arises;
- 5) To continue to provide quality communications with consistent frequency to the membership.

Proposal: The President (Paddy Wiesenfeld), President-Elect (Diane Wotta), Past President (Regina Vidaver), Board of Directors (McManus, Woo, Hodes, Grako, and Haller), and appropriate committee members will develop a strategic plan with one- and five-year goals to present to the National Council for approval in June 2007.

Implementation:

**SDE- GWIS Strategic Plan
2007-2012**

1) To identify and develop a pool of leaders for tomorrow to reinforce and/or replace the leaders of today

We have had difficulty attracting chapter leaders to the National level as committee members and officers. This is probably due to many reasons, but mostly due to the perception that a national office is a daunting task, consuming excessive time and energy. In order to dispel this perception, we need to enhance our support for national leadership training, mentoring and coaching of young leaders. Currently, we have the **Sistering-up** mentoring program, but no formal established leadership training and orientation program for new leaders. Therefore, we need to:

- a) Identify potential officers from the pool of current chapter leaders:** National officers should provide names of potential officers as evidenced by their chapter involvement. This list should be maintained by the National Corresponding Secretary and updated as recommendations are submitted. Even though an individual may not be available for a position during a given year, she may be available in the near future due to changes in her personal or professional life.
- **1-year goal:** Beginning July 2007: the Nominating Committee should solicit names from every executive officer, Board of Directors member, and chapter (through the chapter liaison or president).
 - **5-year goal:** By July 2012: the *Potential National Officer List* should have 20-25 solid names on it. The individuals on this list will have been vetted by the Nominating Committee prior to being approached as nominees for positions. The list should feature qualified individuals who are committed to the tenets of SDE/GWIS at the National level, who have shown competence and dedication at the chapter level.
- b) Develop competency in National Leadership:** Establish a three-tiered training program for entrance into National leadership rank: e.g., 1st tier--Fellowships Committee--due to the independence of this committee, 2nd tier--Membership, Honorary Membership Award, and Chapter Establishment Committees, 3rd tier--Nominating, Parliamentary, and Financial Oversight Committees. In this way the individual will begin to understand the internal processes of the organization and will have the appropriate background to handle the responsibilities of an executive officer (e.g., VP, Pres-elect, and President).
- **1-year goal:** Beginning July 2007: Five new leaders should be inserted into tier 1 and 2 Committee structures based on their interest in SDE/GWIS, prior to moving into executive leadership positions.
 - **5-year goal:** By July 2012: **All** new leaders shall begin at the entree tiers **first** according to their interest before advancing to executive leadership levels.
- c) Enhance leadership development** by nationally providing leadership workshops, implementing orientation, officer transition, and sister-up training for all new officers at the annual meeting.

- **1-year goal:** Beginning July 2007: provide the first leadership workshop, orientation, officer transition and sister-up awareness at the national meeting. In addition, the newly organized national Leadership Development Committee would develop guidelines for the new Leadership Award to be awarded to an up-and-coming leader who will commit to serving as a National Officer after attending leadership training. Goal: To begin to explore the mechanism for raising money for this award, as well as how to award it.
- **5-year goal:** By July 2012: Every annual conference would provide some form of formal leadership training funded by the National Organization. This then becomes one of the perks for the local chapter to host the National Conference. In addition, a GWIS Leadership Award could be awarded annually (perhaps \$2000), once sufficient program support has been received (about \$10,000), to provide tuition for leadership training for a future leader. This individual would agree to become a candidate for a National office, thereby applying the skills acquired in the leadership training program to benefit the National Organization.

d) Encourage more chapter leaders to attend the national meeting and thereby develop their interest in serving the National Organization.

- **1-year goal:** Beginning July 2007: Use all avenues to announce the National Travel Award (websites, e-newsletter, The Bulletin, etc.) to the National Conference. Financing will continue through the Ruth Dickie Fund and the Omega Chapter Fund equally. Goal is to provide \$250 for 10 members. (Total=\$2500 annually)
- **5-year goal:** By July 2012: Raise the goal to \$500 per individual for 10 members due to targeted fundraising for the Travel Award Fund. (Total=\$5,000 annually)

2) To expand and to sustain a balanced membership of graduate students and professional women.

The 2006 membership analysis showed 60% of our membership is graduate students and 40% is made up of non-student membership (including life, regular, emeritus, and honorary members). But in actuality, only 15% are paying non-student members. In order to sustain operations with dues revenue and to provide adequate networking and support for graduate students, the optimum percentages should be reversed-60% non-student members and 40% students. This is based on successful chapter demographics. Therefore, national membership recruitment efforts should also focus on identifying "regular" memberships. For example, the National President or Chairman of the BOD should make an effort to communicate with the Honorary members about SDE/GWIS and its programs.

Note: one "regular" membership provides the revenue of two graduate student memberships and generally a 'regular' member will maintain her membership over time, while a graduate student will usually move and lose contact with the Organization once she has received her degree. This does not mean that we reduce emphasis on graduate student memberships, but become more focused on 'regular' recruitment strategies. To increase our "regular" membership base, we need to:

- a) **Develop recruitment strategies for each chapter through analysis of the membership.** The newly reactivated Membership Committee would work with the chapters to develop and communicate recruitment strategies for each Chapter. Analysis of each chapter's membership component should lead to various efforts by chapters.
- **1-year goal:** Beginning July 2007, the Membership Committee will analyze each chapter's membership, based upon the current membership database, and will help develop strategies to increase membership appropriately balanced for each chapter with the Chapter President or Chapter Liaison. Chapters like Nu, Beta, MSU, or Psi may encounter constraints on non-student membership because of their designation as student chapters by their associated institutes. Obtaining academic and/or corporate support is also encouraged for Chapters with a mixture of graduate and regular members. Activities could be Career Fairs, one-day symposiums on current topics, networking evening events, etc. The Membership Committee is to work with the chapters to understand their need and interests.
 - **5-year goal:** By July 2012, the Membership Committee will have provided long-term recruitment strategies to all chapters. Each chapter should be working to attain their membership goal of 60% regular membership and 40% student membership, thereby increasing National's overall membership demographics. The Membership Secretary or Executive Director should provide assistance as needed.
- b) **Develop attractive National membership brochures** to be distributed at scientific meetings annually. These brochures should be colorful and capture the essence of the organization, while being continually updated with current information.
- **1-year goal:** Beginning July 2007, the Publicity Committee should be reactivated to work with a graphic designer to develop an attractive brochure. In the absence of a Publicity Committee, the Editor should take the lead, having access to a graphic designer for the Bulletin. Budget for printing should come from the Ruth Dickie Fund. Business card e-templates should be developed and made available to National or Chapter officers.
 - **5-year goal:** By July 2012, a colorful National Brochure (4-fold) should incorporate every chapter's information, with more details in 6-fold chapter brochures. Several portable booth displays should be developed and made available to any Chapter for display at major science meetings or official local and national Organization activities. Funding should come from the National Operating Fund. . As membership increases, some additional revenues should be available to supplement financing chapter promotional efforts. The Membership Secretary or Executive Director should provide the lead to facilitate distribution of displays with the chapters.

c) **Transfer new Omega members into the chapters** as soon as possible to provide an active 'home' for these members. The Membership Secretary should do this in consultation with the Membership Committee and the New Chapter Establishment Committee. When there is a critical mass of members (7) in a geographic area, a new chapter can be established. The best way to retain a member is to get her involved in enjoying the benefits of GWIS.

- **1-year goal:** Beginning July 2007: the Membership Committee should analyze the Omega membership quarterly and develop strategies for transfers to existing Chapters and to the chapter establishment committee.
- **5 year goal:** By July 2012, five new chapters should be developed from former Omega members. This will require collaborative efforts from the Membership Committee, New Chapter Establishment Committee, and the Membership Secretary with specific strategies to increase the participation of small and new chapter members in taking leadership roles in the National Organization.

d) **Expand professional affiliations by National to supplement "regular" membership.**

Professional organizations with women scientist members provide an excellent source of outreach for GWIS (e.g.; our current affiliation with the American Association for the Advancement of Science provides us with the opportunity to participate in program planning for AAAS and to develop scientific programs for the AAAS Annual Meeting). The National Organization should become strategically affiliated with appropriate organizations (e.g., National Postdoc Association, biotech trade associations, large speciality groups (AHA, ACA, etc.), Science departments, medical device industry, etc.) so that the chapters have the opportunity to affiliate with the local chapters of these groups and develop productive, interactive relationships. Minority and women groups of scientific organizations also would be good areas to pursuit.

e) **Facilitate the evolution of graduate and post-doc membership to "regular" status**

Given the preponderance of student members currently in GWIS, it is important to retain these members, not only for the good of the Organization, but also to support them as they move into their first careers as young scientists.

- **1-year goal:** Beginning 2007, the Membership Committee should remind chapter liaisons to personally contact their student and "regular" members at critical graduation times (e.g., May 1, 2007, August 1, 2007), to map their progress toward their degrees, identify their needs that might be fulfilled by the Organization, and where applicable get their forwarding information and provide them with guidance on GWIS chapter contacts located near their next destination.
- **5-year goal:** Retention levels for student members will exceed 75% and "regular" membership will have increased accordingly..

f) **Opportunities:** There are many opportunities for GWIS to become involved in supporting women in science. This may be done through affiliations at the National level (e.g. MentorNet, National Post Doctoral Association, Women in Science and Engineering, etc.) or by involvement at the state level through STEM initiatives, Science

Fair Judging, State Academy of Sciences, State Science Teachers Association, affiliating with medical technology-biotech associations (e.g., Life Science Alley). Interesting articles could be sent to the a well-developed newspaper sources as a way to give GWIS more exposure. By developing these affiliations and working with others, we gain name recognition as well as supporting young girls and women in science locally, nationally and internationally.

1-year goal: Beginning 2007, the National Executive Board will begin to identify, implement and communicate appropriate and meaningful national affiliations (e.g. expand MentorNet membership to Affiliate Plus Member), National Post Doc Association, Women in Science and Math, etc.) to the chapters.

- **5-yr goal:** By July 2012, National should have at least five new affiliations that benefit National as well as the chapters for recruitment of new members.
- g) **Honorary Members:** Every effort should be done to include honorary members within our organization. They should be ask to speak at National Meetings, held up as role models for our younger members, and given the prestige that is due them within our organization.

3) To gain greater efficiencies in our administrative processes and to become technologically savvy without changing our mission.

We must continue our search for an Executive Director to provide continuity to our Organization. As web technology changes, we need to change with it by developing a sharper website, an on-line dues payment system, installation of more chapter websites and reactivation of our listserve. This will require teamwork by technologically savvy members.

- a) **Chapter Websites:** Work closely with chapters that currently do not have websites to help develop their websites and hosting them on the subdomain of the National site
 - b) **National Listserve:** Reactivate the listserve using currently available technology
 - c) **Dues payment:** Develop an on-line payment system with credit cards, possibly integrated with the Merrill Lynch system.
- **1-year goal:** Beginning July 2007, the President shall organize a Technology Committee to aggressively work with chapters to develop functional and updated websites. The Technology Committee will explore re-activating the listserve, as this activity was excellent for developing name recognition among our peers and differentiating GWIS from AWIS.
 - **5-year goal:** By July 2012, the Technology Committee shall implement an efficient on-line payment system through a third party (like Acteva) that provides ease of payment, automatic membership database management and integration with Merrill Lynch. Then dues could be electronically distributed to the appropriate chapter accounts. Chapters and members could have access to contact information in the database, and there would be immediate inclusion of new members. The Technology Committee also will have revisited the National website to update its functionality and design.

4. To grow our operating funds to sustain existing non-fellowships programs and to develop new programs as the need arises

Our current non-fellowships programs include: Chapter Travel Awards to the National Conference, New Chapter Start-Up Funds, Chapter Website installation, National Directory every two years, and Printing of SDE/GWIS History. New non-fellowships programs include: Leadership Award, enhanced National marketing, paid position for Executive Director and continuous collection of oral histories.

- **1-year goal:** Beginning July 2007, the Secretary will send a separate mailing to the members with a letter from the President asking for additional support for specific programs. The Editor will develop a fundraising remit envelope for the Bulletin asking for support for the Chapter Travel Award, New Chapter Start-up Funds, and Leadership Award. Donors are more likely to give to a program, rather than a generic 'operating' fund. In 2006-2007 operating donations were \$510. The goal for 2007-2008 will be to bring in \$2000.
- **5-year goal:** The newly activated Development Committee will continue to annually request support from our members and will continue to communicate with future donors. We need to develop a relationship with these future donors, so that GWIS will be remembered in their estate planning. We need to develop corporate sponsors and memberships as well with continuous thank-yous, updating on activities by the corresponding secretary. Goal for 5th year is Travel Award at \$5,000. Goal for New Chapter start-up funds is \$2,500 (\$500/chapter), and Leadership Award is \$10,000. This will be a cumulative goal over five years and must be met before increased awards are given. All individuals and chapters receiving funds will need to provide documentation on how the award was used.

5) To continue to provide quality communications to the membership with consistent frequency.

We have expanded our chapter communications with the advent of the monthly e-newsletter, which has become an important vehicle to provide current news, job postings, and issues of importance. This publication has allowed the biannual printed newsletter, *The Bulletin*, with its enhanced design and expanded content, to eventually become a revenue-generating publication through ads and fundraising with remit envelopes. We assume that we know what the chapters want as deliverables from National, but we have never surveyed the membership. In order to better understand what the chapters need, we will survey the chapters, communicate the results, and then provide the resources to meet those needs.

- **1 year goal:** Beginning July 2007, the Executive Board will develop a comprehensive survey for the chapters to submit critical feedback on National's service. The Executive Board will communicate the results to the membership and devise a strategy to meet stated needs.
- **5-year goal:** By July 1, 2012, programs should be in place to support the chapters' needs assessment from the survey, designed and implemented by the Executive Board.