

CERAMIC TECH CHAT

Episode 20

Title – “How to craft a strategic plan: Mark Mecklenborg and Dana Goski (E20)”

INTRO

De Guire: “I’m Eileen De Guire, and this is Ceramic Tech Chat.

In September 2021, the Board of Directors of The American Ceramic Society approved a comprehensive strategic plan to guide the Society for the next few years. The plan is the result of an extensive process that was more than a year in the making.

Today we talk with the two of the people who led the process: ACerS immediate past president Dana Goski and ACerS executive director Mark Mecklenborg. Next month, in January, we’ll talk with current president Beth Dickey about the details of the plan and what it means for ACerS members in the next few years.

But today, we will focus on how the plan was developed, its top-level goals, and how the Society will start working with the plan.”

(music)

SECTION 1

De Guire: “So, Mark, I believe it was you who first suggested doing a comprehensive strategic plan to the Board of Directors. What was the need that you saw, and why did you feel that now is the right time to engage in a basically 360-degree strategic process?”

Mecklenborg: “Thanks, Eileen. As I became executive director in 2018, I wanted to set some real goals for us to accomplish. And to me, the best way to accomplish that was to engage the membership and a lot of the leaders of the Society in providing input.

So we set out, and in 2020, we started with a focus group. Of course, COVID cut that short, and so we had a little bit of a problem doing the schedule. But the main reason that we were doing this is to set the stage for the next...we started out thinking about five years, and then we said, ‘In this environment, it’s really best to only focus on three years.’ And we wanted to establish a document that was approved by the Board, that was created with significant, significant input from the membership and staff of the Society, and then it would guide us as to what to do the next three years.

Now we’ve done that in the past, but this plan we set out to really establish SMART goals. So, really, they have things that were strategic, measurable, actionable, able to be completed in a certain time frame. And so, it was a very different type of plan. It probably

is a little bit more focused on really how do we accomplish these goals that we have set in this plan. So, I believe that's really how we got started.

I wanted it so that I could essentially use it to help lead the staff of the Society, because the strategic plan will become the annual business plan that we focus on each year and try to achieve. So, it's all tied together, and I think it's something that's gonna really lead us in the right direction."

De Guire: "Great. And, Dana, as a Board member, and at that time you would have been in the succession chain for president, what were your thoughts when Mark came to the Board with this suggestion?"

Goski: "Thank you for asking me that, Eileen. Mark and I had actually been discussing that idea for a while, and I was definitely energized for ACerS to have an actionable plan of direction because it had been nearly a decade since the previous process. Changes happen with time, and as incoming president, I wanted to make sure that we set the stage for a flexible process that allowed Mark as executive director, his staff directors, the future Board members in the Society to be as successful and fiscally sound as possible."

De Guire: "Great. And so with the decision made to go forward, Dana, what were the guiding principles that the Board and you and Mark used to collect information that would go into the strategic plan?"

Goski: "We were very cognizant that we wanted and needed broad and diverse input. Some important perspectives are ones we might not have been aware of otherwise. We also wanted to review and update our mission, vision, and core values first to benchmark any changes in those over the last decade, which might direct our planning.

Mark and I recognized that we needed a solid core of volunteers and staff to help refine the process and help with our data analysis. That team consisted of ourselves, Steve Freiman, Mario Affatigato, Michael Johnson, Andrea Ross, and Bill Janeri. We really wanted Steve Freiman on board because of his insight as a past president, current responsibilities as our parliamentarian, and his abilities as a facilitator.

As guiding principles and part of our navigational system in the strategic planning process, we used core values of accountability, excellence, inclusion, service, education, and collaboration."

De Guire: "So, with those guiding principles in place, what then was the actual process? How did the Society go about getting input from so many diverse stakeholders, both members and nonmembers?"

Goski: "Mark and I presented a detailed timeline plan to the Board of Directors. We established the planning team and communicated the process to our Society leaders. In fall of 2020, we asked them to complete a SWOT analysis. So, strengths, weaknesses, opportunities, threats. This included members of the planning team, the Ceramic Arts Network team,

Division leadership, the principal activities committees at ACerS, the President's Council of Student Advisors, the Young Professionals Network, and the Diversity & Inclusion Subcommittee.

The scientific member network, we call it SciTech members, raw data SWOT study and then e-digital media Ceramic Arts Network's SWOT were then presented to the Board of Directors and shared out with the same groups of people that helped create them. We asked them to do three things. We requested that they identify the top five takeaways on the report. We asked that they identify the strategic issues facing ACerS and what key actions ACerS should consider to address those. During that time, we also walked through input to revise our mission statement, vision, and core competencies.

We essentially alternated strategic planning reviews with the Board and leadership meetings to finalize and approve a written document and plans through 2021. The planning team then compiled those for presentation to the Board, but the key staff involved were absolutely critical in helping organize the information systematically. We also provided the 2008 strategic plan and some 2019 strategic initiatives and draft mission statements to make sure we didn't miss anything.

The key part of the process was sharing those documents out to the non-Board member leadership and staff directors, incorporating their feedback where we might have had potential blind spots. Important to this process was identifying what resources were needed and what was viable from a staff perspective. Mark will probably want to elaborate on part of that process."

Mecklenborg: "Thanks, Dana. I wanted to add another important part of what we did to accomplish that. And that was in 2020, we had engaged a marketing research firm to do a member survey. And we started out with focus groups at Daytona Beach in January 2020, before the pandemic. We slowed it down after that because we were in a different situation. But I believe around the summer of 2020, we had produced a quantitative survey that we sent to both members and a group of nonmembers so that we got input from both people who are members and have been members for a while but also those who might have some connection with us but who are not members of the Society. So, all of that was compiled through this marketing research study, and then that was produced and we reviewed that in December 2020.

And that was an important part. Dana already talked about the part of the process where we asked our various leaders, including Section and Chapter leaders, to review all this data and to give us key takeaways. And we produced incredible volume of information.

So, in addition to going outside, we went inside to the ACerS staff to make sure that they had really communicated some of the important things to consider about the areas in which they were responsible. That included, you know, all of our products and services, and anything that we were thinking about doing, so that we could capture that type of information. That came in the form of both analyzing the membership survey and also in analyzing and producing SWOT analyses for each of their areas. And so that was a very,

very valuable part of the input. So, we really did capture input from, I would say, thousands of people in this process. A lot more through the membership survey, but then a lot of input from the leaders of the Society, really from all over the world, through the SWOT analyses and the evaluation of the results from the membership survey.”

(music)

SECTION 2

De Guire: “So, Mark, you mentioned thousands of people contributing. That’s an awful lot of input. What was the process for doing the analysis of all that data?”

Mecklenborg: “Well, it was a very difficult process because we decided to take this on by ourselves rather than hiring a consultant to do that. And I think that’s an interesting decision that we made because we felt that all of us on the leadership team had a lot of experience with strategic planning and we could deal with this. But I think the capturing of the data and the categorization of the data was extremely difficult. I personally spent a lot of time really analyzing that data and coming up with documents that really the team could take a look at, that staff could take a look at. And eventually we got it into a summary-type version that we could present to the Board and ensure that the Board had all this input from everybody.

So, really we tried to at one point organize it according to categories. So, if it had to do with meetings, we lumped all that data together under meetings. If it had to do with publications, we lumped all that data together with publications. And then there were many comments and many things that really went across the board and went to areas outside of what we had really been doing in the past. So, really that, I think that was really a key part of the process. Because of my experience with the Society, I was able to I believe categorize it in a way that made sense moving forward. And maybe Dana can comment a little bit more on that.”

Goski: “Absolutely. As Mark said, we were trying to categorize. There was just so much information, we had to start somewhere, and with Mark’s expertise, he was able to build out the categories and the communications content, diversity and inclusion, education, workforce development, industry engagement, meetings, membership, students, networking, operations, and publications.

And the other interesting component of that is all the statements that were made were included in that data sorting. So as this information was put into a variety of different buckets and different ways to look at it, we were able to sort it. And then this approach made the information more manageable for the team. But it had not yet been prioritized. So obviously, the next following steps is a series of activities where we have some feedback routes to prioritize those.”

De Guire: “Great. So, both of you mentioned the pandemic once or twice, but overall did the pandemic have much impact on your ability to run the process and get a good outcome?”

Goski: “Absolutely it had an effect. You know, a strategic plan is about the future. And while the mission of The American Ceramic Society had not itself changed monumentally, how we approach solutions could and did. The lack of in-person meetings and inability to travel were front and center for us. Mark and I had to find our objectives for the strategic plan. We were flexible in adjusting timelines, and we had to cancel an in-person retreat we had planned. We were determined to state how we would measure progress for the Society objectives and knew we needed to allocate resources, assign tasks to specific people or groups, and schedule each phase of work.

So this was some really heaving lifting to take on strategic planning, for both volunteers and staff. The staff on the planning team was absolutely invaluable. But we asked for and received accountability and engagement from the Board of Directors, Division, Committee, and other leadership volunteers. You know, it is their community. We needed to hear from them, and we could not have developed the plan without their participation. It was mostly virtual, though.

I do wonder if perhaps the pandemic actually increased our engagement level of participation because people did have ideas, new ideas, and they had concerns about a changing future. And because they could be part of a community where there are many people are experiencing some form of isolation, they did step up and participate, and we are very appreciative of that.

Mark, did you have your perception on how the pandemic impacted the planning process?”

Mecklenborg: “Yeah, I mean, I think it mainly impacted the schedule at first because we had all kinds of things planned to happen at various meetings that were scheduled. We were going to have an industry focus group at Ceramics Expo, which was supposed to happen in May 2020. Of course, that got postponed and became a virtual meeting, and we lost our opportunity to do that. So, we had to use the great word that came out of the pandemic. We had to ‘pivot’ and use other methods to really attract industry to provide to us, and we did establish some online feedback mechanisms from focus groups. And that was mainly part of the development of the member survey. We wanted to make sure we had covered appropriate areas in the member survey and were asking questions that made sense. And I think we did a very good job of putting together a member survey that provided the information we needed in order to do that.

But really I agree with Dana that in a way, the fact that people were at home working and were able to contact us via Zoom may have actually added to the engagement because otherwise we’re only going to engage people at onsite meetings, at in-person meetings, and so, I mean, we were going to do, of course, some Zoom meetings, but it was primarily going to take place in person. And so, that was the big difference, and I think it had a pretty big impact on it. I think Dana mentioned this but it really changed the thinking of people, where they’re going, ‘Okay, the world’s changing over the next three years. What’s going to happen?’ And they had a much more futuristic approach than what they

could have had if they were just trying to tweak various products and services that ACerS offered. So, I think we got some more opportunistic ideas out of the membership moving forward.”

De Guire: “Yeah, that’s great. Certainly, the pandemic shook us all out of our comfort zones and got us use to thinking are there different ways of accomplishing a variety of goals.”

(music)

BREAK

De Guire: “Do you want to support the next generation of ceramic and glass materials scientists? ACerS offers a number of ways for both members and nonmembers to support the Society, through volunteer opportunities, various professional networks, and the Ceramic and Glass Industry Foundation. Learn more about these opportunities at www.ceramics.org/get-involved.”

SECTION 3

De Guire: “So let’s talk about those goals a little bit. Dana, can you walk us through the high-level version of the strategic plan.”

Goski: “Sure, Eileen. Everyone’s work was now focused into five key goals with about 50 actionable strategic initiatives. The five key areas for us: First, increasing the number of professional members and their engagement with the Society.

Second goal was to develop new and revised programs and activities to better meet the needs of industry. Almost half of our members are from industry, and we heard from them that they needed more support.

Third, expanding our global culture of inclusion and actively working to develop membership within underrepresented groups. So, we have lots of activities planned for that over the next couple years.

The fourth goal was enhancing content, products, and educational programs to better meet the needs of members. And this is through a variety of different activities, including publications, media products, conferences, things of that nature, and some training programs.

Fifth goal is that we will increase the awareness of ceramics and glass in partnership with our Ceramic and Glass Industry Foundation. This includes establishing outreach at, at least, in building three relationships by the end of 2022 and bringing awareness of ceramics and glass to at least 50,000 students annually by 2023.

So those are our top five goal, and as I said, there’s about 50 strategic initiatives within those that we have laid out.”

De Guire: “I think what impresses me about the top-level goals is that they are very action oriented. They’re not, in other words, they’re not aspirational. The Society isn’t saying we want to be better. We’re saying we want to meet our members where their need is and has laid out some really specific audiences—industry, students, diversity—and, you know, with some real solid goals to go with that.

So, Mark, you’ve been with the Society for a few years. 20ish, 30ish. You’ve been through these exercises before. So, I’m wondering, were there anything that were surprises to you? Especially in the outcome of the plan.”

Mecklenborg: “I think this is the first plan that I’ve been engaged in that really focuses on the next three years rather than more aspirational. And I think we needed that at this time to really focus us, you know, during this difficult time where we’re facing a lot of uncertainty. And I believe that also this is the strategic planning process that involved the most input from members. And I thought that was significant in itself, just the level of engagement by the leaders within the Society, the leaders within Divisions, Chapters, in Sections, and our various principal activity committees. They really had a chance to get their ideas across for the first time. And it’s not that we captured all those ideas and we’re not doing all those ideas because there were hundreds and hundreds and hundreds of these ideas. But it was really the first time that I believe we had a really, I guess I would call that a consensus building process to where we identified five strategic goals that really need to be worked on over the next three years.”

De Guire: “Great. So, what are the next steps? How does the Society start to work with the plan?”

Goski: “So, the list of goals and initiatives have to be assigned to either staff or volunteer groups and leadership. And so, Mark’s team is taking a look at who needs to be the lead on that. There’s a process called RACI that we’re using. I believe that’s what we’re using, Mark, right?”

Mecklenborg: “Yes, it is.”

Goski: “And I can’t remember what each of those are, so I’m gonna need you to explain it.”

Mecklenborg: “Okay, so, it’s acronyms. So, it’s responsibility, accountability, consult, and informed. So, those are the four words. So who is responsible, who is accountable, who do we need to consult with to ensure that we create this plan or implement this in the appropriate way. And the final one was who do we need to inform about that so that really, it’s effective. And so, that type of thing has been developed for all of these, I think Dana said there’s about 50 of them, all these 50 items. And they’re going to be assigned, and that’s a process that’s coming up. We’re going to really review that at an Executive Committee meeting on December 2, and then we’re going to move forward with the next steps. And the next steps are that we’re going to essentially go out and have meetings with all the various groups that were involved in the planning process to let them know what

part of this can they implement, what is their role in this. So, we'll have meetings with you know the principal activity committees. We will have meetings with Divisions to let them know what they can do. And a lot of these are collective things that Divisions can do; each Division can do the same thing. We're going to meet with Sections, so U.S. Sections, and we're going to meet with our International Chapters to really let people know and to try to get them excited about really implementing their plans.

You know, The American Ceramics Society is a lot of people working toward a common goal. And so, you have a lot of these different organizations within The American Ceramics Society, and we need to move them forward in a common direction. And that's what the implementation plan is and next steps to try to get them to do that. And hopefully by recording this, it helps people to understand a little bit better what the process was and what we hope to accomplish. And, we need everybody involved."

De Guire: "Absolutely. So, we touched real briefly on the top-level goals, the five top-level goals. But, Mark, where can listeners go to read the plan and learn more about it?"

Mecklenborg: "So on our website ceramics.org, there's a thing in the top navigation called 'About.' And if you go into 'About,' it talks about things like who are your Board of Directors and things to that nature. And it also includes the strategic plan. Now, this is publicly facing, so it just has a summary of the strategic plan. In order to get the full strategic plan, you can log in as a member and it's a members-only type situation, but you can access that via the same link."

De Guire: "Great. And we'll put that in the show notes too. So, Dana, the Society's given itself some pretty ambitious goals, all within reach, but they are aggressive and ambitious and also very exciting. So, how would you suggest listeners get involved?"

Goski: "Members can reach out directly with the 'Volunteer now' button on the ceramics.org website. They can contact membership staff to get connected with a group of interest to them specifically. Nonmembers can consider membership, there is free membership and discounted membership in some cases also through the website. Members of the public who might be interested would be best perhaps to contact the Ceramic and Glass Industry foundation if they are interested in supporting the plan through that nonprofit, educational outreach arm of the Society. They can also reach out to Mark or myself directly to bridge a connection to the right person."

Mecklenborg: "I think that also I wanted to mention that part of the plan is really about engaging members, and there's a lot of activities that involve engaging members. So we will be reaching out to a lot of groups and trying to get people involved in the Society."

De Guire: "Great, wonderful."

(music)

CONCLUSION

De Guire: “While the goals laid out in the strategic plan are certainly ambitious, they are also exciting opportunities to propel the Society forward in its mission to better serve the global ceramic and glass community.

I’m Eileen De Guire, and this is Ceramic Tech Chat.”

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“Visit our website at ceramics.org for this episode’s show notes and to learn more about the new ACerS strategic plan. Ceramic Tech Chat is produced by Lisa McDonald and copyrighted by The American Ceramic Society.

Until next time, I’m Eileen De Guire, and thank you for joining us.”