

THINKING & PLANNING STRATEGICALLY



*In July 2006, ACGIH[®] came to a
consensus on what will constitute
its success in the future*

This is that direction...

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A strategic planning group consisting of the Board of Directors, invited members and senior staff of ACGIH® met on July 15, 2006 to develop a long-range strategic direction. Bud Crouch, principal partner of Tecker Consultants LLC, led the group through the planning process.

This planning document defines ACGIH's clear strategic direction. It is the planning group's consensus on what will constitute its future success. It answers the following two strategic questions:

1. Where is ACGIH going? *Its future direction.*
2. Why is it going there? *Its reason for existence and core purpose.*

The document also aligns with and supports ACGIH's overall strategic direction.

Planning Strategically:

The existence of this strategic direction and its successful implementation signals the Board's desire to lead ACGIH via a more formal *strategic planning* leadership approach. Developing a strategic direction is not a one-time event, but an ongoing commitment and process to lead the Association in a strategic orientation. The strategic direction represents a compass that will be used to guide ACGIH's future strategic decision-making and ongoing operational work.

Planning Horizons:

During this session, the strategic planning group reviewed the four planning horizons that are used by successful organizations today. These include planning for the near term, 1-2 years and 5 years, as well as strategizing for longer-term horizons of 10 and 30 years. Each of these horizons significantly differ in strategic focus and the length of planning time. Organizations that successfully employ the four planning horizons understand the difference between what should never change, and what should be open to change. They are aware of the difference between what is genuinely sacred to the organization and what is not. This rare ability to manage continuity and change is facilitated by the development and use of the four planning horizons.

Strategic Focus:

Organizational strategic focus or intent is very important. One of the challenges that ACGIH faces is the fact that there is more to be done for members and key stakeholders than it has resources to accomplish. The temptation to do everything can often lead a not-for-profit organization to *try to be all things to all people*. The result of this approach is not doing anything particularly well. If everything is important — *nothing is important*.

Planning strategically is the counter to the *all-things syndrome*. It is about identifying a limited number of *key strategic activities* that the Association must undertake to move successfully into the future. Implementing the new strategic direction will bring focus to ACGIH's future activities.

Strategic Approach:

ACGIH provides a wide portfolio of programs and services – its annual operational and business plans. The approach in defining the new strategic direction was not to identify what ACGIH is doing today, but to determine *what is not being done today that must be done in the future to be successful*. This strategic direction is not about business as usual – *it is about change!*

This approach separates the strategic direction and five-year strategic plan from the annual operations. The strategic direction is a constant reminder, as the leadership team oversees the development of the annual operations, of what must be changed to steer towards the envisioned future.

Updating the Strategic Plan:

A strategic plan that covers the 3 to 5 year planning horizon can only stay current and relevant if the governing body insures that the plan is updated on an annual basis. A strategic plan is not laser-beamed onto a marble tablet that can never be changed. It is the leadership team's *working document*. Therefore, the governing body has both the right and the responsibility to: 1) change the 3 to 5 year strategic plan when it needs to be changed based on sound reasoning and assessment, and 2) update the plan on an annual basis.

Development of the Strategic Direction

The objective of the planning group was to recast a credible and relevant strategic direction that is distinguished both by its simplicity (*user-friendly document*) and its power to assist leadership in making tough decisions in order to sustain ACGIH's success.

We wish to thank ACGIH volunteers, leaders, and staff who offered their valuable time and hard work to participate in the successful development of this strategic direction. It is the responsibility of the entire ACGIH leadership team to give the new direction meaning and life.

STRATEGIC ASSUMPTIONS



The following are ACGIH's ten-year assumptions concerning the *key external trends, challenges, or issues* that will impact the profession and the Association in the future. They may represent future opportunities or threats.

Financial Issues:

- The globalization of the world's economy will continue to increase.
- More associations will be vying for members from same pool of candidates.

Public Health and Environmental:

- Expanded responsibilities of industrial and environmental hygiene professionals.
- The development of the responses to any major disasters (e.g., avian influenza and potential for pandemic) is increasingly involving the profession in planning for response.

Government:

- Litigation, legislation and regulation impacting the profession will continue.
- Regulation of health issues by government agencies are cyclic in nature and impacts the products and services to be produced.
- Restriction of access and use of non-governmental agency derived health guidelines could become a critical issue.
- Federal agencies are not allowing employees to participate in ACGIH leadership roles.

Changes in the Industrial Hygiene Profession:

- Based on U.S. Bureau of Labor Statistics' estimates, overall employment of industrial hygienists is expected to remain level or experience no more than modest growth, within the range of average increases for all occupations (9 to 17 percent) through 2014.
- The outsourcing of government jobs to contracting companies (consultants) is a growing trend. This continued trend reduces the pool of professional resources available to serve in leadership positions on the board of directors and committees.
- The number of academic programs in occupational hygiene will remain relatively level, but an increasing number of them will offer degrees that reflect the demand for health and safety generalists (as opposed to more narrowly focused industrial hygiene specialists).
- The health, safety and environmental professional's responsibilities are being broadened. The expanded responsibilities make it less likely that the health

professional will be highly competent in all areas of responsibility.

Changes in the Workplace:

- The future workplace will increasingly be dominated by small service-producing businesses that are widely distributed and utilize an increasingly diverse and transient workforce.
- The value of human life and the expectation for the workers' "quality-of-life" varies from country to country. Products and services are being outsourced to the low cost producer even if the workers' well being is compromised.
- Manufacturing in this country continues to decrease. Lower-skilled manufacturing jobs will continue to be transferred abroad to economies with abundant and cheap unskilled labor. At the same time, manufacturing jobs in developed economies will require an increasingly higher-skilled workforce.

Technology:

- The production of goods and services in the US will continue to involve new or "exotic" technologies. Rapidly bringing them to market will outpace the knowledge of their possible public/occupational health and environmental impact (similar to the current situation involving nanotechnology and biotechnology).
- There is continuous progress in identifying an individual's genetic variability (e.g., biomedical science) and understanding what it means. This could create important ethical implications.

Mega issues are overriding issues of strategic importance that cut across multiple outcome areas. They address key issues that ACGIH must answer, illuminating choices it must make, and the challenges that need to be overcome to better serve its members, fulfill its purpose, cause or mission, and to successfully move into the future. The planning group developed the following mega issues.

Strategic Purpose, Focus and Governance:

- What is the profession and who are the professionals that ACGIH serves?
- What is the vision that ACGIH will need to develop that will inspire people to follow and join?
- What can ACGIH do about the issue of diminishing members? (e.g., There are more associate members than regular members.)
- If ACGIH changes the bylaws to allow associate members to participate as leaders in the organization, what will that mean to the stakeholders' perception of the organization?

- What is ACGIH's role as a player in the international occupational health and safety community?
- What will ACGIH need to do in the future to maintain its status as a leader in the occupational health and safety field that provides useful, high quality and timely products and services at a reasonable price and in a timeframe consistent with its members needs?
- Should ACGIH proactively, specifically define, or try to define, sensitive worker populations so that these workers can be informed of special susceptibilities in their work/occupation?

Financial:

- What will ACGIH need to do to remain financially viable in the future? The shifts and decreases in the organization's revenue streams will absolutely require a clear focusing of leadership efforts?
- How can the association best encourage increased funding and better utilize its resources to support its cause?

Membership Value, Relevancy and Indispensability:

- What will ACGIH need to do to successfully increase its membership in the future?
- What will be the future, major growth markets for ACGIH's TLV[®]s and Industrial Ventilation products?
- What will ACGIH need to do to remain relevant in the business of disseminating scientific and technical knowledge? How can it be constantly aware of the emerging issues (increased relevancy)?
- In what way can ACGIH best define, fund, communicate and nurture the diverse membership segments and members who fit and support its mission in many different ways?
- How can ACGIH make the right connections with other groups and professions to make its vision happen? Who should it create strategic partnerships with in the future?

Image, Reputation and Brand:

- How can ACGIH increase its credibility and name recognition and establish its unique role and presence in the international community?
- How can ACGIH deal with the damage caused to the public's perception of the scientific quality of the organization's practice guidelines and the perceived lack

of openness and transparency?

- What can ACGIH do to increase the recognition of the occupational health and safety profession by the general public in the US and abroad?

Volunteerism and Participation:

- How can ACGIH recruit the best volunteers to lead its organization? *People with a passion for what they are doing and who are willing to lead the organization.*

Identity of Excellence (ACGIH's Branding)

An identity of excellence describes the framework for ACGIH that will be required to sustain a position of relevance and earn a reputation for value and excellence for the future.

An organization with a true cause or constituent focus must start with the knowledge of what the constituent considers to be of value and then build a comfortable relationship with them to be seen as the provider of choice. Value can be defined as the constituent's definition of quality relative to quality programs and service delivery – the right product, at the right price, and in the right format and delivery.

Brand is composed of two essential elements that form a value equation – the *value proposition* and the *value discipline*.

Value Proposition (The promise that ACGIH makes to its cause and key stakeholders.)

The programs and services that ACGIH will offer and the nature of the delivery experience based on relevant dimensions of value that members want.

+ Plus

Value Discipline (The implementation of that promise.)

ACGIH is branded for advancing worker protection by providing timely, objective, scientific information to occupational and environmental health professionals.

This brand will need to be supported by good operational effectiveness, the ability to create strong membership loyalty, and being an advocate for advancing occupational health through the exchange of balanced, state-of-the-art information.

Value Proposition: What ACGIH must offer:

- Science based knowledge and information
- Provide leading edge innovative forums for knowledge exchange, profession development and positive and enjoyable member experiences.
- Understand what members will need to be successful in the future that they don't yet know they need.

- Develop the vision of what the occupational and environmental health profession will look like in the future.
- Create new applications of existing programs.
- Deliver programs through a variety of formats (face-to-face and virtual).
- Build a reputation of providing these leading edge programs with excellence.
- Commitment – *We provide the best information.*

Value Discipline: What ACGIH must do:

- Develop a culture that supports creativity, innovation, and risk taking in order to provide leading edge programs.
- Accept possible missteps, adopt corrective measures, and move on.
- Develop scanning mechanisms to know where the occupational and environmental health profession is going in the future.
- Create a program/service development and introduction process that supports new program and service introduction faster.
- Be willing to leapfrog current programs.
- Operate with financial stability and security.
- Provide quality member/customer service.

To successfully achieve this identity of excellence, ACGIH's strategic direction must support and be linked to this branding.

LONG-RANGE STRATEGIC PLANNING HORIZON



(10 TO 30 YEAR ENVISIONED FUTURE)

ACGIH developed a 10 to 30 year planning horizon, which consists of a core ideology and 10 to 30 year envisioned future.

Core ideology clarifies what must be preserved in an environment of rapid and unpredictable change. Core ideology consists of the Association's core values and core purpose.

The *core purpose* describes ACGIH's very reason for being or existing – why the Association will or should exist for a long, long time (10 to 30 years). What would be lost if it ceased to exist? What sense of purpose will motivate members to dedicate their creative energies to ACGIH and its efforts over a long period of time?

ACGIH's Core Purpose

To advance occupational and environmental health

Core values are a small set of timeless, guiding principles that do not require external justification. They only have intrinsic value and importance to ACGIH and its members. Core values are so fundamental that they seldom change – *if at all*. They define the behavior required in order for the organization to achieve its core purpose. Core values are so deep-seated and valid that the Association would preserve the core values even if it were admonished for having these values.

ACGIH's Core Values

- ***Care for the health and wellbeing of the workers***
- ***Integrity***
- ***Scientific excellence through the pursuit of state of the art knowledge***

The *10 to 30 year envisioned future* consists of two parts: a single, ten-year plus, ***big audacious goal (B.A.G.)*** and a vivid description.

The B.A.G. is a huge challenge and its achievement will require ACGIH to move outside of its comfort zone. The goal can be accomplished and has a clear finish line, but will require a heroic effort and luck. The goal will stimulate membership activity, commitment, and participation beyond ACGIH's present leadership. The B.A.G. is very clear and compelling to members and does not require explanation. It sets the direction for the succession of future three to five year strategic plans.

ACGIH® will be valued as the leader in defining the science of occupational and environmental health

A vivid description shows what the world would be like if ACGIH were to achieve its Big Audacious Goal. It will look like the following.

ACGIH:

- has been a leader in improving occupational health, which has resulted in safer places to work worldwide.
- has more members in the association
- has more members worldwide involved in association activities.
- is sought out to define occupational and environmental health science.
- talks to the broader healthcare community.
- has provided technically proficient and updated guidelines.
- provides leading edge seminars on occupational and environmental health.
- provides state-of-the art professional information.
- has significantly increased its financial capacity and stability.

THREE TO FIVE-YEAR PLANNING HORIZON



The following is ACGIH's three-to-five year strategic plan, which consists of key, short-term infrastructure actions that are required to better link the infrastructure to the new strategic plan, three-to-five year goal statements, strategies, and milestones for each goal, and a three-to-five year envisioned future.

Three to Five-Year Envisioned Future

An envisioned future is a simple and concise picture of an ideal, desired future for the organization out three to five years. The envisioning process is the leadership team-reaching consensus on what future success will look like. By engaging in an envisioning process, the Association is already beginning to create its own future. It sets direction and helps to focus ACGIH's strategic planning efforts. The process of developing an envisioned future is as important as the direction itself. The envisioned future does not supplant the 3 to 5 year strategic plan, it comes before it. The envisioned future sets the tone and direction for the strategic planning process.

By the end of 2011, ACGIH will:

- have significant membership growth.
- enjoy increased recognition, image and branding for being the leading source for information and knowledge about occupational and environmental health.
- have increased member participation.
- be a force in creating an environment to improve worker health.
- have increased financial capability.
- have forums for bringing together the science on emerging issues.
- be using multiple technology platforms to extend its international reach.
- be providing ongoing membership scanning and market research.
- have strategic partnerships to grow its resources for members.
- offer a number of new programs and services.
- be providing new sources and forms of information and knowledge about occupational and environmental health.
- have improved press coverage and recognition.
- have a number of collaborative relationships and partnerships.

Infrastructure Issues (Next 12 to 18 months)

The planning group also identified areas in ACGIH's infrastructure that will need to be reviewed and possibly reshaped to better align it with the new strategic direction, and to more effectively support the Association's future success. These issues will need to be addressed in the next 12 to 18 months in ACGIH's operations to enable the implementation of the strategic plan over the next 36 to 60 months.

Membership

- Increase membership satisfaction and retention.
- Increase the number of international members.
- Increase volunteerism.

Governance

- Continue development of a knowledge-based strategic governance system and focus.
- Improve volunteer leadership development and succession planning.
- Review the Board's role, responsibilities and behavior (*the will to govern well*).

Staff

- Review staff's capability, expertise and capacity to support the new plan.
- Increase communication up, down and across ACGIH.

Long-Range Financial Plan and Policy

- Develop long-range projections.
- Develop policy for a formal dues plan and structure (tiered structure with dues increases at shorter intervals and smaller increments).
- Develop a formal policy for the contingency fund.
- Identify future sources of revenue:
 - ⇒ diversified net, non-dues revenue,
 - ⇒ customers - non-member revenue and sponsorships.

Technology

- Replace association management software
- Real-time web integration
- Enhanced E-Commerce
- E-Community

LONG-RANGE GOALS



The following represents ACGIH's long-range goals that encompass its three to five year direction. These goals are outcome-oriented statements that lead ACGIH towards its envisioned future. These goals are not in any order of priority. All of the goals will need to be accomplished, if ACGIH is to fully achieve its three to five year quest.

In 2012:

Goal A. *ACGIH will be its member's dominant resource for the integration and exchange of scientific and technical knowledge.*

Goal B. *ACGIH will be a leading source for information and knowledge about occupational and environmental health.*

Goal C. *ACGIH will be a powerful force for creating an environment to improve worker health.*

LONG-RANGE GOALS & STRATEGIES

Strategies indicate how ACGIH will organize, focus, and expend its resources and actions to maximize its effectiveness and efficiency in achieving these goals. The strategies must be reviewed and updated on an annual basis.

Milestones are used to determine the overall progress toward a goal. They indicate how close ACGIH is to achieving a goal as it executes the individual strategies for each goal. **The milestones measure goal achievement, not strategy achievement.**

Goal A: *ACGIH will be its member's dominant resource for the integration and exchange of scientific and technical knowledge.*

Strategies:

Membership Development

- A1. (Immediate) Review and update professional membership categories by:
- Evaluating the anticipated impact to the organization of a change in professional member categories;
 - Educating and engaging in discussion of the need for review and possible change; and
 - Developing position/recommendation for professional member category or categories

Leadership Development

- A2. (Immediate) Offer tangible benefits for member participation.
- A3. (Short-Term) Increase membership's involvement in Committees by:
- identifying more opportunities for members to participate; and
 - offering equal participation for all committee members.
- A4. (Long-Term) Increase ACGIH's international reach through the better use of technology for meetings.

Members Primary Resource

- A5. (Immediate) Identify and prioritize resource needs and wants of members (e.g., needs assessment, surveys, training and emerging tech areas).
- A6. (Short-Term) Develop products to meet the assessed resource needs.
- A7. (Long-Term) Create platforms to readily deliver or provide access to members' resource needs (e.g., Wikipedia – integration and exchange and the better use of technology).

Milestones:

An increase in:

- members and membership retention.
- membership participation (etc., leadership and committees).
- non-dues revenue.
- the better use of multiple technology platforms.
- ongoing membership scanning and market research.
- strategic partnerships to grow indispensable membership resources.
- attendance at professional meetings and educational events.
- positive member feedback concerning new programs and services.

Goal B: *ACGIH will be a leading source for information and knowledge about occupational and environmental health.*

Strategies

- B1. (Immediate) Evaluate and, as necessary, make changes to ACGIH's committees to determine if they are the correct committees to address critical professional needs and issues.
- B2. (Immediate) Identify and prioritize committee scope to address their professional needs now and in the future, domestically and internationally.
- B3. (Short-Term) Identify and assign committee projects to advance the science of occupational and environmental health.
- B4. (Short-Term) Produce timely, cost effective, useful and high quality deliverables.
- B5. (Short-Term) Identify vehicles to market and deliver monographs, webinars, publications, seminars, and workshops.
- B6. (Short-Term) Identify opportunities for cross-pollination between committees (nanotech, genomics, biotech, emerging diseases, and natural disasters).
- B7. (Long-Term) Solicit member/customer input on defining the scope of committee products.

Milestones:

An increase in:

- the number of new sources for information and knowledge about occupational and environmental health.
- vehicles to market and deliver monographs, webinars, pubs, seminars and workshops.

- the number of timely, cost effective, useful and high quality deliverables.
- opportunities for cross-pollination between committees.
- Member/customer input on defining the scope of committee products.

The existence of:

- a reviewed and re-evaluated ACGIH committee structure.
- a prioritized committee scope to address professional needs now and in the future.
- assigned committee projects.

Goal C: *ACGIH will be a powerful force for creating an environment to improve worker health.*

Strategies

- C1. (Immediate) Increase visibility of ACGIH at professional conferences (e.g., PCIH, NSC, SOT, ASSE, etc.) and develop relationship with other related organizations and international societies and groups.
- C2. (Immediate) Make a commitment to IOHA by continuing to be an IOHA member and to appoint an official delegate.
- C3. (Short-Term) Facilitate networking options to explore common problems and potential solutions (chat rooms, listserv, blogs, etc.).
- C4. (Short-Term) Solicit and work with other industrial groups to develop symposia.
- C5. (Long-Term) Create forums for bringing together the science on emerging issues.
- C6. (Long-Term) Translate products into other languages.

Milestones:

An increase in:

- the visibility of ACGIH at professional conferences.
- ACGIH's impact in creating an environment to improve worker health.
- positive press coverage and recognition.
- forums for bringing together the science on emerging issues.
- requests for ACGIH speakers and subject matter experts.
- networking options to explore common problems and potential solutions.
- collaborative relationships and partnerships with other industrial groups to develop symposia.

- products translated into other languages.