

**DED Planning Retreat
August 4, 2013**

FIRST DRAFT - Post-event Report

Summary

The ASME DED conducted a strategic planning retreat on August 4, 2013 at the Oregon Convention Center in Portland, Oregon. The purpose of the meeting was to hold interactive discussions around critical questions identified by DED leadership. All discussions were designed to elicit ideas on how DED can focus on shaping their strategic environment over the next five to ten years. Not all ideas generated will be implemented, but those ideas that gained traction and energy during the event should be duly considered as an integrated part of DED strategy going forward in so far as the points mentioned remain relevant and desirable.

Association Trends

As part of the discussion we examined several large trends impacting associations on a global scale. DED leaders are urged to consider the impact of the following factors on all proposals they chose to prioritize and pursue in order to create the optimal member experience.

Time Compression – How can we save our members time?

Specialization/consolidation – How can we be flexible enough to provide resources for emerging technologies within our own group?

Technology – How can we embrace rapidly evolving technologies so we stay as close to our members as possible?

Globalization – How can we create an effective and welcoming multi-cultural eco-system?

Workforce Skills Gaps – How can we ensure our educational programs are evolving to address the global skills gap and adjust to meet the expectations of new generations of learners?

Educational Disruption – How can we adjust to the massive disruptions being seen in the K-12 system as well as in the post-secondary environment?

Gamification – How can we capitalize on gaming mechanics to provide member experiences that are fun, social and educational?

Five Whys

As part of the event, we conducted a “Five Whys” exercise. Participants were asked to look at the ASME mission statement, “ASME’s mission is to serve diverse global communities by advancing, disseminating and applying engineering knowledge for improving the quality of life; and communicating the excitement of engineering,” and to ask themselves why this mission statement is important to them. Participants then shared their answers with the group.

According to the responses we received from the exercise we are able to draw several conclusions. The DED members involved in this session have a deep commitment to improving humanity through engineering and design. There was also a great deal of energy around the idea that design and engineering allows for creativity, excitement and fun while solving real world problems for individuals and society. There was also enthusiasm around the idea that this mission can also create and sustain life-long learning, shared knowledge between colleagues and lasting relationships.

Questions Posed

There were three question blocks designed to elicit ideas focused on three key areas.

Question Block 1 – Who Will We Be in 2018 to 2023?

Question Block 2 – What Will Be the Member Experience by 2018 to 2023?

Question Block 3 – Moving DED Forward to 2018 to 2023

Several themes repeated themselves throughout the day. The first theme involved a more intentional expansion into the global community with energy around changing the name of the organization to reflect a more inclusive outlook. Closer and more integrated relationships with industry partners were examined on a number of levels. Better integration with the K-12 system was also discussed. Resource needs, including a need for more funding and an expressed desire to better understand how staff and volunteers can work together more productively, were also highlighted. Most importantly, there is a renewed focus on membership and ensuring the reasons to join DED are understood better via investigation and market research, clearly articulated, well communicated and of deep value.

The items that received the most attention and support from the group overall included:

Webtool and jtool are getting confusing/dated/rigid (23)/Improve webtool and jtool (20)

What do industry members and prospective industry members really need? What can we provide to them? Conduct market research, focus groups, etc., to find out. (18)

Advisory boards (15)

Money (15)

“Star Alliance” for mechanical engineering (14)

Crowdsourced conference program preparation, organization (tech tours, social events) coupled with blog-style continuous update of status (11)

Major design competition, i.e., expand into non-vehicle domain (like SAE) (11)

IDETC “App” that is easy to navigate (iDesign)™ (10)

Regionally-tailored IDETC (customize each DETC to local industry and ASME provides survey of industry landscape/industry day? Targeted workshops? Job fair? Local ASME day?) (8)

Citation notification system (8)

Appendix A includes a full information capture from the flip charts to be referred to and used to spur discussion in the future.

Strategic Positioning

As part of our work, we will be synthesizing the newly identified initiatives that emerged from this process. We will draft a new strategic environment work-plan for DED leaders, volunteers and staff to use to manage assignments, accountability and costs and to begin to develop the resources to position DED for the future. The strategic initiatives identified by program participants are ambitious and we expect the achievement of many of the individual items to take several years. The work-plan will be attached to the final report.

Conclusion

DED is a vibrant community which is reaching for a new plateau. Thank you for your energy and your enthusiasm for this process. By making a joint commitment to see DED achieve its potential, you are serving as an example for associations and professional societies everywhere.



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APPENDIX A

DED Strategic Planning Retreat
Raw Information Capture
August 4, 2013
Oregon Convention Center, Portland, OR

QUESTION BLOCK ONE WAS DESIGNED TO EXAMINE WHO/WHAT DED WANTS TO BE IN 2018. PARTICIPANTS DID NOT RANK OR PRIORITIZE THESE ITEMS. THESE ITEMS WERE MEANT TO SPARK DISCUSSION AND EXAMINE PROVOCATIVE IDEAS.

Question Block 1 – A - What does our global membership look like by 2018 to 2023?

ASME – ISME; DED – IDED

What if conferences /meetings/jamborees were organized more globally?

What if : Asia = 30%, Europe = 10%, North America = 55%, South America = 3%, Africa = 2%?

What if we expand our membership two- to three-fold?

What will we provide to the memberships in different regions? Professional certification? Training on software tools?

What if we are able to increase the level of participation for undergrads?

What if we increase pre-college membership for K-12 students?

What if we offer DED membership to corporations as opposed to individuals? Maybe we offer access to proceedings, ASME publications, ASME training workshops?

What if DED offers reciprocal memberships to regional societies in other countries?

Question Block 1 – B - What private, public and governmental conversations are we driving by 2018/2023?

What if ASME fellowships for Gov Int'l gov't positions and more opportunities in US gov'n't?

What if ASME led/coordinated large foundation responses/proposals to foundations (e.g., Gates?)

What if DED actively promoted gov'n't members for fellowships and gov't foundation positions?

What if ASME/DED were actively involved in accreditation of engineering programs (e.g., ABET) + MOOCs?

What if ASME/DED is helping industry identify new/emerging research areas/thrusts of national and international importance?

What if we enable/empower TC's to engage the public better on what engineering and design is?

What if we were driving conversation on how to teach design?

What if we were engaged in conversations on energy, water, security, healthcare and food?

What if DED is helping TC's identify and promote "core" expertise? Also provide incentives to strengthen "core" expertise?

What if DED actively engages key individuals in industry in conversations on research/impact and relevance? (what is the DED equivalent of IGTI?)

What if industries align with "technologies"? (What is DED's technology?)

What if undergrads find real value in their ASME membership? (toolkit for design courses? Design tutorials? Gamify design through DED? Design competitions and challenges?)

What if engineers were valued?

What if government and foundations understands our importance and engages us in conversation?

What if the public appreciates what we do and people strive to become engineers?
What if industry comes to us with challenging problems?

Question Block 1 – C - What strategic partnerships have we created and why?

What if we were an institute?

EDUCATION: ABET certification, media/publicity, more competitions for students, fostering innovation, entrepreneurs.

ASME/Partners: BIO, CIE, manufacturing and so many other divisions (31 of them), student sector

INDUSTRY: Industry based advisory board, certifications, programs/conferences/publications, standards, additive manufacturing.

JOURNALS: New J 1) computation verification in medical devices (no home), 2) additive manufacturing

SOCIETIES: IEEE, ACM, IIE, IFTOMM, Student chapter, NCIAA

GLOBAL: Other, governmental, FOA, NIST, Canada, South America, Asia

Question Block 1 – D - Are we member focused or profession/industry focused in 2018 to 2023?

What if DED was the gold standard for design content?

What if all students and early career professionals actively engaged in DED?

What if we exhibit in Las Vegas?

What if the world moves to additive manufacturing? Are we the drivers of the future or the followers?

What if DED increased technology transfer?

What if we increased industry involvement in DED?

What if industry members received direct, personal benefits from ASME?

What if we could address member needs 24/7: content, networking, technical, local, student?

What if others knew what it was to be an engineer and became members?

What if the majority of DED members do not speak English (i.e., we are not US Centric)?

What if ASME “Wikipedia” could answer any technical question?

What if DED becomes the clearinghouse of technical information? The one-stop shop for codes and standards?

What if we certify design for new and existing platforms (gaming, K-12, excitement, fun!)?

What if DED experiences a 10% increase in non-US membership?

QUESTION BLOCK 2 WAS DESIGNED TO EXPLORE THE MEMBER EXPERIENCE. THE NUMBERS IN PARENTHESIS ARE THE NUMBERS OF PARTICIPANTS WHO RANKED THOSE ITEMS AS THEIR FAVORITES.

Question Block 2 – A – How are our members interacting with each other and with DED as a whole?

Crowdsourced conference program preparation, organization (tech tours, social events) coupled with blog-style continuous update of status (11)

Major design competition, i.e., expand into non-vehicle domain (like SAE) (11)

Crowdsourced reviews: some examples – SPM “bidding” for reviews. This might increase non-author participation through engagement, Archinax post pre-prints comment, “like” (2)

We interact in the same ways as people in general

Vacation together (4)

Camps

Social media, e.g., CIRP LinkedIn group (1)

ASME.org

- Duplicates Facebook and LinkedIn
- Info is not there yet
- What is unique?
- There is some confusion about ASME.org

TCs outreach

- Specific outreach
- Newsletter (ME mag in November)
- Website
- People come to DED and ask what DED can do for them

Job searching

- Networking is the only way it works (3)
- What if ASME/DED could facilitate this?
- Serve the inter collegiate

Joint conferences are easier

International conferences are easier

Question Block 2 – B – How are we impacting our members' career track?

1. JOURNALS:

- Increase to 10-12 (12)
- Other formats for disseminating information (2)
- Impact factors increase
- Online

2. CONFERENCES:

- Virtual, low cost networking (1)

3. INDUSTRY INVOLVEMENT

- How to help their careers (12)
- Attract participation
- Offering credentialing, training and education
- Reaching out to learn about their needs

4. STUDENTS

- Networking/internships (5)
- Future jobs defining (1)
- ASME design competition

5. ACADEMIA/FACULTY

- Faculty advisory board to ASME (6)
- Career paths
- Provide tools for time management
- Data mining

6. LIFE-LONG LEARNING TRACK

- Involve K-12 in design process; project opportunities; mentoring (13)
- Internship matching; hosting jobs and internships on the website (4)
- Reaching out to high school teachers/home school students

7. GLOBALIZATION

- Preparing and training engineers (1)

8. MID-CAREER

- Management training for technical (3)

Question Block 2 – C – What niche needs have we identified and addressed?

K-12 Niche services/delivery

- Virtual games like Minecraft? (1)
- Physical games like First Like, focused on design (7)

Undergrad Niche

- Wikis, toolbox, DED portal
- Consolidate
- Networking
- Design Research Exposure
- Ambassador (design) (8)
 - Young Faculty
 - Young Students
- Local Chapter
- Student Chapter (DED Connection)
- International Student Chapter

Entrepreneurial Niche

- SBIR Workshops (3)
- IP Workshops (5)
- Entrepreneurship spotlight activity (8)
 - Keynotes
 - Mini workshops
- Marketing/Team Business Plan

Professional Niche

- Webinars, podcasts
- Skill certification route (1)
- DED Committees (special)
 - Professional Licensing
 - Entrepreneurship
 - Driven by industry partners
- Social events (DED Open House) (5)
- Guest badges
 - Local industry
 - K-12

Conference Niche

- Better exhibits/expo (11)
- More social activity
 - Student network (5)
- Video dissemination (4)
 - Keynotes
 - Tutorials/workshops
- Industrial sponsorship to offset costs (1)

- Better marketing of existing programs (e.g., workshops) (1)
- Strategic retreats for TCs (tied to box lunch)
- Non-traditional formats
 - Presentation only
 - Poster

Question Block 2 – D – How can we encourage a strong ecosystem for underrepresented segments?

“Star Alliance” for mechanical engineering (14)

IAME (9)

Assessment of local regional societies and infrastructures

Cooperate with other ASME divisions that are active there (8)

ASME should have a section in every country (2)

How can ASME get involved in solving problems in developing countries? (2)

Bring IDETC to Africa or South America (2)

Support accreditation activities (1)

How do we certify mechanical skills in developing countries? (1)

Iran?

Funding

Question Block 2 – E - What products and services have we added, discontinued or refreshed by 2018 to 2023?

1. Webtool and jtool are getting confusing/dated/rigid (23)
2. IDETC “App” that is easy to navigate (iDesign)™ (10)
3. Regionally-tailored IDETC (customize each DETC to local industry and ASME provides survey of industry landscape/industry day? Targeted workshops? Job fair? Local ASME day?) (8)
4. Design challenges/sub conference tied to emerging areas (e.g., Additive Manufacturing) (6)
5. When you buy the paper, you get the presentation for free (and author is notified and/or incentivized) (6)
6. Webcast/stream conference talks (provide menu of choices to industry) (3)
7. Program booklet (see “App” suggestion) (2)
8. Register once in ALL ASME DBs for conference, journal, ASME.org, reviewers, Etc., (2)
9. Industry Expo at IDETC or separate industry event run by DED (2)
10. Align workshops and content with audience (industry) (2)
11. National capstone “expo” tied to local showcase/expo (1)
12. More flexible conference format (while maintaining high quality) (1)
13. Stop producing CD/DVD format for proceedings (1)
14. Must change format for ASME books, journals, etc., (1)
15. TC for AM?
16. We need to become international (US – overseas)
17. Series of podcasts/videos on cool design stuff

QUESTION BLOCK 3 WAS DESIGNED TO CONFRONT ISSUES REGARDING DECISION MAKING PROCESSES AND RESOURCES NEEDED TO CREATE THE IDEAL MEMBER EXPERIENCES BY 2018/2023.

Question Block 3 – A – How can we maximize our governance structure?

1. Parallel institute/division structure. Institute: systems design. Division: knowledge development involving multiple divisions (6)
2. Technology integration teams/committees. People: information exchange, Tech transfer, certification/training learning tracks (1)
3. DED management structure:
 - committee management structures and options
 - advisory boards (15)
 - clustering with industry/groupings tech (7)
 - conference oversight team @ DED level
 - interface with local units
 - nominating/development committee
 - leadership development formalisms
 - future society leadership liaison
 - past chairs council (9)

Question Block 3 – B – How can we maximize use of staff?

1. Make staff responsive to conference organizers and DED execs directly (5)

Question Block 3 – C – What additional resources do we need?

1. Money (15)
2. Better journal tool (11)
3. Better web support and design (3)
4. Branding (2)
5. More motivated, committed people (2)
6. Time (1)
7. Dedicated staff support for IDETC
8. Marketing
9. Use independent contractors for services

Question Block 3 – D - What new technologies should we implement?

1. Improve webtool and jtool (20)
2. Citation notification system (8)
3. Lab demonstration kits for schools
4. “iDesign” and mobile apps (3)
5. Social media; Twitter feed (2)
6. A way to see the Top 10 cited and downloaded papers for each DED journal (with affiliation information) (2)
7. eLearning/MOOC type delivery (2)

8. Live webcasts that are archived (1)
9. Customized packaging of papers (top down and bottom up packaging) (1)
10. Group sourcing software
11. Data mining
12. P.E. Study guides

Question Block 3 – E – What additional information do we need?

1. What do industry members and prospective industry members really need? What can we provide to them? Conduct market research, focus groups, etc., to find out. (18)
2. Can we learn about best practices from other societies? (6)
3. How can we capitalize on video recordings, livestreaming and recasts? (3)
4. Can we figure out what our constraints are? (2)
5. We need timely budget information. (1)
6. Can we identify where industry partners are located? (1)
7. What technology do we need to target industry with?
8. Can we purchase market research?