

CH2M HILL Alumni Association

Strategic Plan 2020



Updated January 2022

Version 2022.02

CH2M HILL ALUMNI ASSOCIATION

STRATEGIC PLAN 2020

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OVERVIEW

CHAA Vision Statement

“Preserve, grow, and pass on the values, history, and friendships of the great people of CH2M HILL.”

CHAA Mission Statement

“The CH2M HILL Alumni Association is a member-supported organization that:

- connects the CH2M HILL family and fosters new friendships,*
- encourages the continuation/establishment of autonomous alumni groups,*
- sponsors interesting alumni activities and reports alumni news,*
- celebrates the people and history of CH2M HILL,*
- reaches out to the greater community to perpetuate and share the Little Yellow Book values and legacy of CH2M HILL.”*

CHAA Value Proposition

“Our Special Legacy Lives...Connect with Old Friends & Make New Ones”

CHAA Goals

CHAA’s initial goals are directly aligned with the stated intentions of the Mission Statement. For the 2020 Strategic Plan, the six CHAA Goals are:

- Goal 1. Provide an enduring CH2M HILL Alumni Association
- Goal 2. Maintain a home place for the CH2M HILL family
- Goal 3. Collaborate with autonomous CH2M HILL alumni groups
- Goal 4. Be a catalyst for CH2M HILL alumni activities
- Goal 5. Celebrate the people and history of CH2M HILL
- Goal 6. Reach out and pay forward the Little Yellow Book values and legacy of CH2M HILL

Update approved by the CH2M HILL Alumni Association Board of Directors on April 18, 2022

Signed: _____
President

CH2M HILL Alumni Association Strategic Plan 2020

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CH2M HILL Alumni Association Strategic Plan 2020

Version 2022.02

1.0 INTRODUCTION

The CH2M HILL Alumni Association Inc. was established as a non-profit corporation on April 5, 2018. As stated in the Articles of Incorporation, the original purpose of the CH2M HILL Alumni Association (CHAA) is to preserve and maintain the relationships and friendships built during our association with CH2M HILL. The new, independent alumni organization was necessary due to the sale of CH2M HILL to Jacobs Engineering in December 2017. Membership in CHAA is open to any retiree or former employee of CH2M HILL, and to friends with university, client, and contractor affiliates of CH2M HILL or its acquired CH2M HILL Companies, Ltd. group of companies.

The CH2M HILL Alumni Association is not affiliated in any way with or supported by Jacobs Engineering Group Inc. or its acquired CH2M Companies, Ltd. group of companies. Jacobs Engineering Group Inc. is not responsible for any content published by or activities of the CH2M HILL Alumni Association.

The scope of CHAA has now grown well beyond its initial roots in documenting the history of CH2M HILL. To manage the establishment and growth of the organization, an initial leadership team was assembled in 2018. It included a slate of officers and a Board of Directors, which was expanded from 8 to 13 members in 2019. In early 2020, the leadership team sanctioned the development of this Strategic Plan to guide CHAA operations into the future. The original version of this Plan was adopted by the Board on January 18, 2021. This update 2022.02 was approved by the Board on April 18, 2022.

1.1 PURPOSE

The purpose of strategic planning is to establish overarching goals for an organization and to develop an implementable plan to achieve them. As initially prepared, the CHAA Strategic Plan sets a direction, establishes a framework, and identifies actions to be taken. The CHAA leadership team uses the Strategic Plan to set priorities and to focus on objectives that, collectively over time, move CHAA ever closer to its Vision. The leadership team revisits the Plan each year to assess progress to date, and to reset annual goals and to outline initiative programs for the coming year.

In general, the CHAA Strategic Plan is based on a model that:

- **Provides a Vision Statement** that describes what we would like to see happen in the future. (It should be concise, clear, and inspirational.)
- **Establishes a Mission Statement** that describes how the CH2M HILL Alumni Association intends to work towards the Vision. (It should be short, memorable, tell the story of why we exist, and what makes it worthwhile.)
- **Defines Goals** needed to achieve CHAA's Mission and to guide the organization's planning and actions. (The goals should be SMART: Specific, Measurable, Attainable, Realistic, and Timely.)
- **Describes the Strategies** to be employed to accomplish each Goal. (The Strategies should provide an approach to addressing the issues and needs of each Goal.)

- **Provides Tactics** that describe the tasks necessary to accomplish each Strategy. (The Tactics are the “how” in support of the Strategies “what.”)
- **Presents Metrics** to provide a framework to define activities and measure progress towards achievement of each Goal. (Metrics can be simple (yes or no), measured (50 %), descriptive (in process), or others that describe the status of activities.)

1.2 STATUS

New organizations typically develop through a sequence of phases: Storming, Forming, Norming, and Performing. In this case, the Storming Phase involved the extraction of the original CH2M HILL Alumni program from the Jacobs Engineering organization and the formation of a new, independent CH2M HILL Alumni Association. The process continued within the Forming Phase, with the establishment of a Board of Directors, appointment of Officers, and incorporation as a non-profit organization. Work continued in 2021, where Norming activities saw the establishment of Board committees to deal with routine matters and task forces to attack short term issues. This work will continue into 2022, with implementation of new tools and a look towards reaching out beyond the traditional limits of CHAA. It will likely take several more years for the CHAA to step up into a true Performance mode.

1.3 IMPLEMENTATION

Annually, the CHAA Board of Directors will decide on a direction for the new year and on initiatives to undertake in the year ahead. For 2020, ongoing CHAA activities were maintained while the Strategic Plan was completed. Upon adoption of the Strategic Plan in early 2021, action items were defined and work was initiated to begin implementation of the Plan. A table in the Appendix provides an assessment of the status of each element of the CHAA Strategic Plan as they have progressed over the course of the year. The status will be updated annually as the Plan is revisited for the upcoming year. For 2022, ongoing work by the Board committees will continue with emphasis on membership service systems; information and archive agreements with Oregon State University, CH2M HILL Alumni Center and Benton County Historical Society; and connections with local CH2M HILL groups. Planning efforts will continue for the rescheduled Alumni Reunion in Atlanta, and options for encouraging local alumni events will be explored.

2.0 CH2M HILL ALUMNI ASSOCIATION STRATEGIC PLAN 2020

2.1 INITIAL PLAN

The CHAA Strategic Plan 2020, as originally developed, rests at a fairly high level. It is provided as a guide for the development of the CHAA organization. As activities got underway in 2021, the Officers, Board committees, and task forces began implementing the Plan, including fleshing out the details of how individual activities are undertaken, measured, and achieved. For example, something as simple as “Publish a newsletter” requires many individual tasks to actually make it happen.

The CHAA Strategic Plan 2020, updated for 2022, is presented below. Much of the Plan is still in outline form. Additional details will be incorporated through committee activities and annual updates as the CHAA organization steps through the development phases. For now, this updated Strategic Plan provides a road map to build the CH2M HILL Alumni Association into an enduring organization that benefits its members and those that it touches.

2.2 GUIDING PRINCIPLES

The Strategic Plan is comprised of a variety of strategies and tactics that are attached to individual goals. Each of the strategies and tactics may be addressed through manageable work tasks. The individual activities are accomplished under an overarching set of guiding principles that ensure that the collective body of work advances the overall Strategic Plan. The guiding principles include a vision statement, a mission statement, and a set of goals. In addition, a new Value Proposition statement has been developed and included in the Plan.

2.2.1 CHAA Vision Statement

“Preserve, grow, and pass on the values, history, and friendships of the great people of CH2M HILL”

2.2.2 CHAA Mission Statement

“The CH2M HILL Alumni Association is a member-supported organization that:

- connects the CH2M HILL family and fosters new friendships,*
- encourages the continuation/establishment of autonomous alumni groups,*
- sponsors interesting activities and reports alumni news,*
- celebrates the people and history of CH2M HILL,*
- reaches out to the greater community to perpetuate and share the Little Yellow Book values and legacy of CH2M HILL.”*

2.2.3 CHAA Value Proposition

“Our Special Legacy Lives...Connect with Old Friends & Make New Ones”

2.2.4 CHAA Goals

The CHAA Goals are aligned with the stated intentions of the Mission Statement. For the 2020 Strategic Plan, the six CHAA Goals are:

- Goal 1. Provide an enduring CH2M HILL Alumni Association
- Goal 2. Maintain a home place for the CH2M HILL family
- Goal 3. Collaborate with autonomous CH2M HILL alumni groups

- Goal 4. Be a catalyst for CH2M HILL alumni activities
- Goal 5. Celebrate the people and history of CH2M HILL
- Goal 6. Reach out and pay forward the Little Yellow Book values and legacy of CH2M HILL

Each goal, while individually stated, may overlap with one or more of the other goals due to the intertwined nature of the organization and activities of CHAA. The goals are revisited with each annual Strategic Plan update and have been adjusted as necessary to align with the evolving nature of CHAA.

2.3 CHAA STRATEGIC PLAN OUTLINE

The outline below presents CHAA's Goals, Strategies, and Tactics. Additional details, such as work tasks within Tactics and measurement Metrics, are being added over time as the Plan is implemented. This may include adjustments to minimize duplication between goals. Some goals may eventually be retired as they are accomplished, and new goals may be added to expand the reach of CHAA. As such, the Strategic Plan is a living document that grows and evolves in response to CHAA's real-time experiences.

Goal 1: Provide an Enduring CH2M HILL Alumni Association

This goal addresses the establishment, operation, and maintenance of the CHAA organization. Achievement of other CHAA goals will be difficult, if not impossible, without a well-structured organization that sets direction, provides leadership, and manages activities.

Strategy 1A: Establish a Formal Alumni Organization

- i. Define the Purpose of CHAA
 - 1. Prepare an initial charter for the organization
 - a. See the document from the 2018 CH alumni reunion
 - b. Status: Complete
 - 2. Post on the CHAA website
 - a. See the "About CHAA" tab on the Website
 - b. Status: Complete
 - 3. Include in the Bylaws
 - a. See Bylaws Section 1.3 "Purpose"
 - b. Status: Complete
- ii. Establish a Formal Legal Entity
 - 1. Obtain Legal Assistance
 - a. Retain James Kellogg, Fullerton, CA, who helped submit the non-profit applications pro bono
 - b. Status: Complete
 - 2. Prepare Articles of Incorporation
 - a. See Articles dated 5Apr18
 - b. Status: Complete, Filed on 6Apr18
 - 3. Amend Articles of Incorporation
 - a. See Certificate of Amendment dated 8Jun18
 - b. Status: Complete, Filed on 11Jun18
- iii. Obtain Tax Exempt Status
 - 1. Submit 501 (c) (3) request to the IRS
 - a. Submitted on 19Nov18
 - b. Approval received 23Jan19

- c. See Letter 28Jan19
 - d. Status: Complete
 - 2. Submit Nonprofit Statement to California
 - a. Submitted on 31Jan20
 - b. Filed in Secretary of State 31Jan20
 - c. Approval received 21Mar19
 - d. Status: Complete
 - 3. Provide Notice to CHAA Members
 - a. Prepare letter to donors acknowledging donations to CHAA
 - b. Status: Complete, see 1A, vii, 1, c below
- iv. Establish Bylaws
 - 1. Prepare Review Draft of Bylaws
 - a. Review draft prepared Spring 2018
 - b. Submitted to Board July 2018
 - c. Status: Complete
 - 2. Obtain Board Approval of Bylaws
 - a. Board adopted Bylaws on 13Jul18
 - b. See document: The Bylaws of CH2M HILL Alumni Association _v3.1 7Aug18
 - c. Status: Complete
 - 3. Make amendments to Bylaws
 - a. Amendment No. 1 adopted by the Board on 21 Jan 2019
 - b. Amendment No. 2 adopted by the Board on 17 Jan 2022.
 - c. See document: The Amended Bylaws of CH2M HILL Alumni Association 17Jan22
 - d. Status: Ongoing
- v. Maintain Organization Records
 - 1. Establish Corporate Filing System
 - a. Designate Principal Office
 - i. Designated as the Office of the Treasurer
 - ii. Status: Complete
 - b. Establish Outline of Records System
 - i. Currently an informal system
 - ii. Develop a database system meeting the needs of CHAA
 - iii. Status: A work in progress
 - c. Maintain Records
 - i. Routinely file documents
 - ii. Update files at least monthly
 - iii. Status: Operating effectively
- vi. Prepare/Update Required Documents
 - 1. Corporate Papers
 - a. File annual CA Statement of Information report
 - b. Managed by Treasurer
 - c. Status: Ongoing
 - 2. Tax Returns for CHAA Corporation
 - a. Prepare and submit state and federal tax returns annually
 - b. Accomplished/managed by Treasurer
 - c. Status: Ongoing

3. Board Reports
 - a. Prepare quarterly treasury reports for Board Meetings
 - b. Update and publish with meeting minutes
 - c. Managed by Secretary with input from Treasurer
 - d. Status: Ongoing.
- vii. Manage Financial Affairs
 1. Communication Tools
 - a. Prepare CHAA Business Cards
 - i. Be general for CHAA (not personal)
 - ii. Provide basic contact information on front
 - iii. Provide Vision and Mission on the back
 - iv. Make Available to Officers and Board Members
 - v. Status: Mock up in process
 - b. Prepare CHAA Letterhead
 - i. For CHAA documents and correspondence
 - ii. Status: Complete
 - c. Provide 501 I (3) receipts
 - i. Send to Donors of \$100 or more
 - ii. Status: Ongoing
 2. Accounting
 - a. Maintain CHAA Financial Books
 - i. Begin with Excel Software
 - ii. Upgrade to Access database or similar when necessary
 - iii. Update monthly
 - iv. Status: Operating effectively
 - b. Maintain bank account for CHAA
 - i. Account opened at Bank of America 15Jun18
 2. ii. Designate authorized parti1. President, Vice President, Treasurer, Secretary, Board Member
 - iii. Monthly fee of \$16 waived if balance > \$3,000
 - iv. Deposit funds
 1. Initial deposit made 18Jun18
 2. Continuing deposits made weekly/monthly by Treasurer
 - v. Status: Ongoing
 - c. Maintain independent contractor services
 - i. Webmaster
 1. Dan Lagomarsino
 2. Agreement signed 2Jul18
 3. See Lagomarsino agreement
 4. Payments: When invoiced

- ii. Editors
 - 1. Angie Kruse, Sarah Harter
 - 2. Agreements: Informal
 - 3. See documents: None
 - 4. Payments: When invoiced
- iii. Status: Ongoing
- d. Maintain subscription services
 - i. Domain Server
 - 1. Hostgator
 - 2. Tri-annual Payment of \$142.11, renews 16Oct23
 - ii. Domain Registration
 - 1. GoDaddy
 - 2. Payment: Bi-annual fee \$23.24, renews 12Jun22
 - iii. Email Service
 - 1. Aweber
 - 2. Payment: Monthly fee \$29-\$69, depending on the size of subscriber list
 - iv. Payment Service
 - 1. PayPal
 - 2. Payment: Fee per transaction
 - v. Status: Ongoing
- 3. Director and Officer Liability Insurance
 - a. Determine coverage requirements
 - i. Cover CHAA Board Members and Officers
 - ii. Liability limit: \$1,000,000
 - iii. Status: Complete
 - b. Obtain/Maintain Policy
 - i. Policy obtained from U.S. Insurance Co. Aug 2019
 - ii. Payment: Annual premium \$837
 - iii. Status: Ongoing

Strategy 1B: Provide Effective Governance

- i. Operate CHAA as a Non-Profit Organization
 - 1. See Strategy 1A
 - 2. Status: Ongoing
- ii. Establish a Board of Directors
 - 1. Define Board duties
 - a. See Bylaws Article 3.3
 - b. Status: Complete
 - 2. Establish the number of Board members
 - a. See Bylaws Article 3.1
 - b. Initial Board included 8 Directors
 - c. Board expanded to 13 Directors on 20Jan20
 - d. Status: Complete

3. Recruit, nominate, and approve Board members
 - a. Establish qualifications
 - i. See Bylaws Article 3.1
 - b. Implement a nomination process annually
 - c. Consider/Approve New Directors at Annual Board Meeting
 - d. Status: Ongoing
 4. Establish term limits
 - a. See Bylaws Article 3.4
 - b. Status: Complete
 5. Conduct Quarterly and Annual Board Meetings
 - a. See Bylaws Article 4
 - b. Status: Ongoing
 6. Participate in Board-sponsored committees, task forces and activities
 - a. See Bylaws Article 6
 - b. Status: Ongoing
- iii. Define Officer positions, roles, and responsibilities
1. Establish Officer positions and define responsibilities
 - a. See Bylaws Article 5.1
 - i. President: Article 5.4
 - ii. Vice President: Article 5.5
 - iii. Secretary: Article 5.6
 - iv. Treasurer: Article 5.7
 - b. Status: Complete
 2. Review and approve officers annually
 - a. Initial officers appointed upon establishment of the CHAA
 - b. Officers to be nominated annually
 - c. Consider/Approve Officers at Annual Board Meeting
 - d. Status: Ongoing
- iv. Establish and Operate Board Committees
1. Establish Committees
 - a. Board Committees: See Bylaws Article 6.1
 - b. Advisory Committee: See Bylaws Article 6.2
 - c. Proceedings and Reports: See Bylaws Article 6.3
 - d. Status: Definitions complete
 2. Define and establish Standing Board Committees
 - a. Align committees with the CHAA Strategic Plan
 - b. Committees organized in 2021
 - i. Governance
 - ii Membership
 - iii Local Groups
 - iv Activities
 - v. History
 - vi. Outreach
 - c. Status: Complete

3. Implement Board Task Forces
 - a. Membership Recruitment Committee
 - i. Status: Ongoing
 - b. Nominating Committee
 - i. Status: Assigned to Governance Committee
 - c. Others as needed
 - i. Value Proposition (2021)
 - ii. Database Development (2021)
 - iii. Local Groups (2021)
 - i. Status: Ongoing
4. Assign Officers and Board members to Committees
 - a. Consider in light of the CHAA Strategic Plan
 - b. Status: Complete, review annually
5. Recruit CHAA members to serve on Committees
 - a. Based on active Board committees
 - b. Seek and engage interested CHAA Members
 - c. Status: Ongoing
- v. Provide a System to Support the CHAA Organization
 1. See Strategy 1A

Strategy 1C: Establish Operating Guidelines

- i. Prepare basic Policies and Procedures
 1. Based on the CHAA Bylaws
 2. Establish routine business management
 3. Produce a defining document: TBD
 4. Status: Assigned to Governance Committee
- ii. Set Board meeting schedules and agendas
 1. Board Meetings
 - a. Quarterly
 - b. Annual
 - c. Special
 - d. Status: Ongoing
 2. Agendas
 - a. Establish a standard agenda
 - b. Manage and update Meeting by meeting
 - c. Status: Ongoing
- iii. Define Committee reporting requirements
 1. See Bylaws Article 6.3
 2. Establish format, content, timing
 3. Status: Ongoing
- iv. Measure actions/progress with metrics
 1. TBD

Goal 2: Maintain a Home Place for the CH2M HILL Family

This goal is to provide a home place for people who have worked for CH2M HILL and its many associated affiliates. It is to provide a way to connect with the CHAA and its members, to become a CHAA member, and to contribute to the success of the organization.

Strategy 2A: Provide a Dedicated Website for CHAA

- i. Provide a website for the CHAA organization
 1. Maintain the CHAA website, evolved from the old CH2M HILL platform
 - a. Focus the website on CHAA, with no other affiliations
 - b. Engage outside services to develop and maintain the website
 - c. Monitor and update the website as necessary
 - d. See Strategy 5B for updates, additions, and maintenance of website
 - e. Status: Complete
 2. Include a public home page with links to:
 - a. The CHAA Organization
 - b. Membership Information
 - c. Alumni History
 - d. Contact Information
 - e. Status: Complete
 3. Provide a Members Only site
 - a. Must be a current CHAA member to access
 - b. Requires a username and password
 - c. Provides access to newsletters and CH2M HILL alumni roster
 - d. Status: Complete
 4. Consider a process for sharing information
 - a. Set criteria for content
 - b. Consider posting of user news and comments
 - c. Encourage interesting articles, guides, and tools
 - d. Monitor the site and adjust as necessary
 - e. Status: Unplanned

Strategy 2B: Operate the CHAA Website as a Home Place for CH2M HILL Alumni

- i. Provide a portion of the CHAA website that is open to the general public
 1. Provide informative content about the CHAA organization
 2. Make the public site inviting to CH2M HILL alumni
 3. Provide information about CH2M HILL alumni
 4. Provide notices about ongoing CHAA activities
 5. Status: Ongoing
- ii. Provide a means of communication
 1. Provide a basic "Contact Us" mechanism
 2. Consider a question/comment section to allow limited dialogue among website visitors
 3. Status: Ongoing

Strategy 2C: Encourage, Recruit, Support, and Retain CHAA Membership

- i. Establish and publish criteria for CHAA membership
 1. Post on CHAA website
 2. Advertise for membership on website

3. Status: Ongoing
- ii. Maintain a roster of ex-CH2M HILL people
 1. Direct CH2M HILL Retirees
 2. Alumni now with Jacobs or other firms
 3. Review, update and purge as necessary
 4. Status: Ongoing
- iii. Conduct periodic contact/recruiting activities
 1. Enlist CHAA Board members and others to assist
 2. Use phone, email, social media resources
 3. Actively recruit all the time
 4. Status: Ongoing
- iv. Maintain and share a roster of current CHAA membership
 1. Acquire member names, contact information, and permissions
 2. Share the list with CHAA members as permitted
 3. Status: Ongoing
- v. Maintain an accounting of current CHAA members
 1. Assess annual dues amount vs. operating costs
 - a. Maintain \$20 annual dues as long as possible
 - b. Adjust the annual dues amount as necessary to remain solvent
 2. Consider options for dues payments
 - a. Make an annual payment for a year at a time
 - b. Make an automatic renewal payment (PayPal, etc.)
 - c. Consider multi-year (5- or 10-year) dues payment
 - d. Provide for a life-time dues payment (\$500)
- vi. Record dues payments
- vii. Record and acknowledge donations
- viii. Send notifications and reminders
- ix. Status: Ongoing

Goal 3: Collaborate with Local CH2M HILL Alumni Groups

This goal is for CHAA to engage with the many informal groups of CH2M HILL alumni that have formed to continue personal relationships developed in local CH2M HILL offices, in companies acquired by CH2M HILL, on major projects, or during large programs. These independent groups may have interests that are outside of mainstream CHAA activities, but they are a part of the legacy of the overall CH2M HILL organization.

Strategy 3A: Recognize Local CH2M HILL Alumni Groups

- i. Identify ongoing alumni groups
 1. Local CH2M HILL Groups: based on old offices or regions
 2. Spin-off Alumni Groups: such as IDC and OMI
 3. Acquired Groups: BC&E, Lockwood Greene, Veco, Halcrow
 4. Project/Program Groups: such as Rocky Flats, Hanford, London Olympics
 5. Provide a place on the CHAA website to acknowledge Local Groups
 6. Status: Work in Progress

- ii. Encourage the formation of new CH2M HILL alumni Local Groups
 - 1. Provide a notice on the CHAA website and in the Newsletter encouraging the development of new Local Groups
 - 2. Include a link on the CHAA website with information useful for new Local Groups
 - 3. Provide information and answers to new-forming Local Groups
 - 4. Status: Task Force underway
- iii. Include Board Members from Local Groups
 - 1. Solicit Board members from Local Groups
 - 2. Status: Task Force underway

Strategy 3B: Communicate with Local Groups

- i. Consider a quarterly message to Local Groups from CHAA
- ii. Respond to comments and questions from Local Groups
- iii. Solicit input and photos from Local Groups regarding their activities
- iv. Publish news from Local Groups on the CHAA Website and Newsletter
- v. Status: Task Force underway

Strategy 3C: Encourage Alumni Activities by Local Groups

- i. CHAA to encourage development of Local Group Alumni Reunions
- ii. CHAA to encourage Local Groups to participate in CHAA reunions, activities, and events
- iii. CHAA to encourage Local Groups to participate in local civic events
- iv. CHAA to encourage Local Groups to report their activities to CHAA Website for posting and for the CHAA Newsletter
- v. Status: Task Force underway

Goal 4: Be a Catalyst for CH2M HILL Alumni Activities

This goal is focused on activities for CHAA members. It addresses methods to connect people, to share news and experiences, and to meet for reunions and other events.

Strategy 4A: Be Readily Available

- i. Post CHAA Board contact information on the CHAA Website; email and phone
- ii. Respond to phone/email when messages are received
- iii. Solicit input/ideas from CHAA members
- iv. Provide advance information on upcoming activities on web page and newsletters
- v. Post reports of events and activities on web page and newsletters
- vi. Post a roster of CH2M HILL Alumni as currently known
- vii. Provide a members-only roster of CHAA members with contact information; email and phone
- viii. Ask for member involvement on committees especially Newsletter, Website, etc.
- ix. Status: Ongoing

Strategy 4B: Provide a Members Speak and Act Section on the Website for Members to Submit and Share Information

- i. Solicit input from CHAA members; consider a member survey
- ii. Contact responding members and ask for write-up, photos
- iii. Create an article for the Newsletter on this new section of the Website

- iv. Establish a protocol to review and edit submissions
 - 1. See document (TBD)
- v. Post on appropriate sections of the CHAA Website and share with the Newsletter
- vi. Status: Unplanned

Strategy 4C: Plan and Conduct CHAA Reunions

- i. Strive to hold a CHAA Alumni Reunion every 2 years
- ii. Establish vision and purpose with the goal to keep reunions relevant as CHAA and its members change over time
- iii. Balance social, excursions, history and business, local CH history, and speakers
- iv. Discuss financial liabilities at/with the Board level
 - 1. Consider establishing a Board Committee for guidance and a Reunion Reserve Fund (Committee composed of past reunion leadership?)
 - 2. Focus on up-front costs, deposits, hotel, excursion, transportation costs, minimums, liabilities, penalties, and cancellation fees
 - 3. Consider guidance on standard contracting procedures, Limits of Liability, and event insurance
 - 4. Resolve, if possible, concerns of personal committee member liabilities
- v. Establish a reunion Board Representative and Chairperson for each reunion
- vi. Establish a local planning committee
- vii. Select a location and venue
- viii. Establish budget, registration fees, including allowance for Reunion Reserve Fund, contracts, and event insurance Limit of Liability
- ix. Develop an agenda of activities
 - 1. Excursions
 - 2. Speakers
 - 3. Keynote Speaker
 - 4. Pension and financial planning information
 - 5. Health Insurance
 - 6. Training
 - 7. Social events
- x. Engage a third-party service provider to handle reservation logistics (Greenvelope)
- xi. Manage the reunion activities, budgets, and payments
- xii. Consider Zoom/MS Teams for key presentations, annual report, and a fee to cover costs
- xiii. Wrap up including ideas for the next reunion; location, volunteers, and Chairperson
- xiv. Gather and report wrap-up data, lessons learned, remaining funds, and hand-off (Led by Reunion Chairperson)
- xv. Status: Ongoing

Strategy 4D: Coordinate with Local Groups Regarding Alumni Activities

- i. Coordinate with Local Groups to plan and conduct local alumni activities
- ii. Share information about Local Group activities on website and in newsletters
- iii Status: Initial Planning Stage

Goal 5: Celebrate the People and History of CH2M HILL

This goal is intended to maintain and extend the ongoing Alumni History program that has been active for many years.

Strategy 5A: Maintain the Existing Committee Focused on the History of CH2M HILL

- i. Build from the existing organizational structure
 1. Board/CHAA Members
 2. Web Master (Dan Lagomarsino)
 3. Status: Complete
- ii. Identify and recruit other interested CHAA members
 1. Reach out via personal contacts of the Board/committee members
 2. Reach out via the Newsletter and Website
 3. Identify member(s) to write/edit for the Website
 4. Add an Assistant Editor from CHAA membership
 5. Status: Ongoing
- iii. Continue the History Committee's ongoing solicitation and vetting of historic input
 1. Continue Conference Calls/Zoom Meetings focused on:
 - a. Biographies
 - b. Postings of significant occurrences in CH2M HILL history
 2. Employ a process to review/keep/toss
 - a. (See AH Review Process: Appendix 5)
 3. Status: Ongoing

Strategy 5B: Update and Add to the Alumni Association Website History Section

- i. Solicit documents, reports, photos, and such regarding CH2M HILL history for posting on the Website from Regional Offices, Alumni, and Jacobs. Existing sections:
 1. History of CH2M
 2. Alumni Contributions: Historic Photos, Pro Bono and Community Service, Reflections, and Vignettes
 3. Biographies: Founding Partners, Other Bios, Unsung Heroes & Heroines
 4. Expansions: Office, Affiliates, Mergers/Acquisitions
 5. History by Decade
 6. Innovations: Environmental, Industrial, Mechanical/Electrical/I & C, Multidiscipline, Water and Wastewater, Transportation, Design Build
 7. Publications: Historical and Newsletters
 8. Add new sections as identified
 9. Status: Ongoing
- ii. Receive and review archival material from regional offices and as submitted by individual CH2M HILL alumni
 1. Employ Review Process to review/keep/toss
 2. Employ Production Process to produce and ultimately post material to the website
 3. See AH Production Process
 4. Conduct monthly conference calls/Zoom meetings to monitor progress
 5. Status: Ongoing
- iii. Follow up on historic materials as may be identified by Jacobs
 1. Maintain contact in the Denver office
 2. Status: Ongoing
- iv. Submit to the Newsletter Publisher and/or Web Manager to post on the Website: documents, reports, photos, and such regarding CH2M HILL history. Existing sections:
 1. History of CH2M

2. Alumni Contributions: Historic Photos, Pro Bono and Community Service, Reflections, and Vignettes
3. Biographies: Founding Partners, Other Bios, Unsung Heroes & Heroines
4. Expansions: Office, Affiliates, Mergers/Acquisitions
5. History by Decade
6. Innovations: Environmental, Industrial, Mechanical/Electrical/I & C, Multidiscipline, Water and Wastewater, Transportation, Design Build
7. Publications: Historical and Newsletters
8. Status: Ongoing
- v. Capture other items of significant CHAA activities
 1. Status: As necessary

Strategy 5C: Publish Newsletters

- i. Establish Newsletter goals, schedule, format
- ii. Develop a system to create and publish a CHAA Newsletter; editor, publisher, layout
- iii. Capture news about CH2M HILL projects and related Jacobs projects
- iv. Establish regional coordinators to gather, draft, and/or submit local news and leads for follow-up
- v. Solicit news articles from CHAA members via Website, local office groups, and CHAA leads from correspondence and/or new members list
- vi. Include information regarding plans and actions by CHAA Board and Committees
- vii. Publish a CHAA Newsletter semi-annually
- viii. Maintain a system to disseminate the Newsletter electronically
- ix. Phase out remaining five hard-copy recipients, as need is passed (lack of computer or vision issue)
- x. Status: Ongoing

Strategy 5D: Identify an Archival Entity

- i. Identify an appropriate organization willing to receive, display, and archive CH2M HILL historic memorabilia
 1. Receive, review, and evaluate:
 - a. WBG Reflections
 - b. Corporate Annual Reports
 - c. Limited Edition Quarterly Reports
 - d. Reports Quarterly Publications
 - e. Tie Line Publications
 - f. Alumni Newsletters
 - g. One-of-a kind documents
 - h. Call to Alumni for “garage items”
 2. Submit to appropriate Archival Entities
 - a. Collection ongoing
 3. Utilize the CHAA Website and/or Newsletter
 4. Work with the Benton County Historical Society Museum (Tom Gallagher, Mike Schweizer)
 5. Work with CH2M HILL Alumni Center
 6. Work with OSU website group
 6. Status: Ongoing
- ii. Transmit documents

1. Memo of Understanding
2. Consideration of a contribution to Benton County Historical Society Museum
3. Status: Ongoing
- iii. Develop a process to transmit and organize materials via mail or hand delivery
 1. Status: Work in progress
- iv. Audit periodically to ensure satisfactory performance by all parties
 1. Status: Unplanned

Goal 6: Reach Out and Pay Forward the Little Yellow Book Values and Legacy of CH2M HILL

This goal is focused on activities by CHAA members outside of the boundaries of the CHAA. It is a platform to share the values of Cornell, Howland, Hayes, Merryfield, and Hill, with people and organizations far beyond the footprint of CH2M HILL. The values of the Founders include superior service to clients, continuing education, technical knowledge, common sense, personal responsibility, diversity and inclusivity, collegial relationships, hard work, and celebrated victories.

Strategy 6A: Promote and Encourage Outside Activities by CHAA Members

- i. Use the Website, reunions, and other CHAA activities to promote the value of individual members reaching out in their communities
 1. Include a routine article in the CHAA Newsletter asking for reports of CH2M HILL alumni outreach activities
 2. Feature outreach activities in each Newsletter
 3. Provide a section of the Website dedicated to outreach activities
 4. Include an Alumni Activities button on the front of the web page
 5. Status: Unplanned
- ii. Encourage CHAA members to contact schools, colleges, community clubs, social groups, STEM, STREAM, and others to offer services for presentations and discussions
 1. Identify CHAA members who are willing to make local contacts to determine interest, need, and contact person
 2. Provide a notice about this program and solicit interested CHAA members
 3. Operate as ad hoc, volunteer based on individual passion, rather than directed or organized
 4. Status: Unplanned
- iii. Communicate with professional organizations and groups, such as ASCE, Engineers Without Borders, Water for People, Citizens Climate Lobby, and SWE
 1. Identify CHAA members who are willing to make professional society/organization contacts to determine interest, need, and contact person
 2. Provide a notice about this program and solicit interested CHAA members
 3. Operate as ad hoc, volunteer based on individual passion, rather than directed or organized
 4. Status: Unplanned

Strategy 6B: Collect and/or Develop Materials Regarding CH Values and Lessons Learned

- i. Provide an article in the CHAA Newsletter asking for interest in developing such materials
- ii. Reach out to individuals who are already doing this and ask them to share passion, ideas, and materials
- iii. Set up a place on the CHAA Website where interested alumni can go to see ideas, presentations, and other such materials
- iv. Consider a CHAA working group to develop presentation and discussion materials
- v. Status: Unplanned

Strategy 6C: Capture and Record Outside Activities

- i. Provide a website or other system to identify and publicize outreach activities by CHAA members
 - 1. Request submittals that can be quickly reviewed and posted on the CHAA Website
 - 2. Create subsets by topic as the number of submittals grows
 - 3. List author/speaker with contact information so interested members can connect
 - 4. Status: Unplanned
- ii. Develop a system to gather and archive information on CHAA outside activities, articles, and presentation materials
 - 1. Provide regular notices via the CHAA Website and Newsletters to solicit information
 - 2. Maintain a listing of who is engaged in outside activities and what they are doing
 - 3. Request that materials and ideas be sent to CHAA
 - 4. Status: Unplanned

APPENDICES

STATUS

Status of CHAA Strategic Plan 2020 Elements				
	Storming	Forming	Norming	Performing
Vision Statement			X	
Mission Statement			X	
Strategic Plan Development			X	
Goal 1: Provide an Enduring CH2M HILL Alumni Association				
Strategy 1A: Establish a Formal Alumni Organization			X	
Strategy 1B: Provide Effective Governance			X	
Strategy 1C: Establish Operating Guidelines		X		
Goal 2: Maintain a Home Place for the CH2M HILL Family				
Strategy 2A: Provide a Dedicated Website for CHAA			X	
Strategy 2B: Operate the CHAA Website as a Home Place for CH2M HILL Alumni			X	
Strategy 2C: Encourage, Recruit, Support, and Retain CHAA Membership			X	
Goal 3: Collaborate with Local CH2M HILL Alumni Groups				
Strategy 3A: Recognize Local CH2M HILL Alumni Groups		X		
Strategy 3B: Communicate with Local Groups	X			
Strategy 3C: Encourage Alumni Activities by Local Groups	X			
Goal 4: Be a Catalyst for CH2M HILL Alumni Activities				
Strategy 4A: Be Readily Available			X	
Strategy 4B: Provide a Members Speak and Act Section on the Website for Members to Submit and Share Information			X	
Strategy 4C: Plan and Conduct CHAA Reunions			X	
Goal 5: Celebrate the People and History of CH2M HILL				
Strategy 5A: Maintain the Existing Committee Focused on the History of CH2M HILL			X	
Strategy 5B: Update and Add to the Alumni Association Website History Section			X	
Strategy 5C: Publish Newsletters				X
Strategy 5C: Identify an Archival Entity	X	X		
Goal 6: Reach Out and Pay Forward the Little Yellow Book Values and Legacy of CH2M HILL				

Status of CHAA Strategic Plan 2020 Elements				
	Storming	Forming	Norming	Performing
Strategy 6A: Promote and Encourage Outside Activities by CHAA Members	X			
Strategy 6B: Collect and/or Develop Materials Regarding CH Values and Lessons Learned	X			
Strategy 6C: Capture and Record Outside Activities	X			

GOAL 1

GOAL 2

GOAL 3

GOAL 4

GOAL 5

GOAL 6

SUPPORTING MATERIALS
