

**Strategic planning** is a "disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does and why it does it" (Bryson, 2004)

- focuses on "big pictures"
- visionary
- flexible and practical
- decision making, resource use guide

Step 1:

- are we ready to do strategic planning ?
- plan the plan
- assess stakeholders
- analyze mandates
- SWOT analysis (strengths, weaknesses, opportunities, threats)

Step 2:

- what is our mission and values
- what is our vision (two to five years, or more)
- what strategic issues should we consider
- what are our goals and objectives

Step 3:

- develop strategies and action plans, including budgets
- write the plan

Step 4:

- implement the plan
- monitor your efforts and results
- evaluate where you are going

Benefits of strategic planning:

- increased effectiveness
- increased efficiency
- improved understanding, better learning
- better decision making
- enhanced organizational capabilities
- improved communications and public relations

Reasons to NOT do strategic planning

- organization in trouble
- organization lacks skills, resources or key leader determination to do it

### **Plan the Plan**

How long do we want to project into the future?

\_\_ 2 years    \_\_ 5 years    Other: \_\_\_\_\_

What do we want to address:

Challenges:

Issues:

Problems:

Concerns:

Who are your strategic planning "champions?" What are their abilities, resources and time availability?

Who will be on the strategic planning team (not necessarily everyone on your lodge board. maybe some who are not on your lodge board)?

Who should develop the plan?

Who should review the plan?

Who is the plan's audience?

How much time do you want the strategic planning team to invest in developing the plan?

1-12 hours     12-24 hours     24-40 hours     40+ hours

Will/how will you use external consultants and process experts?

What type of plan do you envision?

- short executive summary
- longer detailed plan, but not with tactics and operational info
- very detailed plan, including tactics and operational info
- other: \_\_\_\_\_

How long with the process take?

6 months     12 months     Other: \_\_\_\_\_

What steps will be taken/who/when

Steps/tasks:

Who:

When:

How will we evaluate the plan's effectiveness?

## Stakeholders

*Create a separate page for each stakeholder.*

Name:

How do they assess our performance:

How important is this stakeholder:

Should they have a role in our strategic planning process?

ignore

consult

decision maker

inform

involve

delegate authority to

More details on what kind of a role you will give them:

## Mandates

What mandates do we have which we need to address:

**SWOT analysis:**

*Go into a lot of detail on each item. You may wish to analyze each opportunity and threat separately.*

What are your lodge's strengths?

What are your lodge's weaknesses?

What are external opportunities?

What are external threats?

## Values, Mission and Vision

Values are core beliefs or desires that guide or motivate our attitudes and actions. They can include:

- principles or standards
- personal qualities
- character traits
- codes of ethics

A mission is a brief statement that reflects the core values of an organization and communicates the organization's long-term objectives - why the organization exists.

A mission statement:

- serves as a communication tool inside and outside the organization
- aligns people with a purpose and fosters commitment and unity
- defines directions for change and growth
- acts as an evaluation tool to help measure decisions, activities and programs

*The mission of Sons of Norway is to promote and to preserve the heritage and culture of Norway, to celebrate our relationship with other Nordic Countries, and provide quality insurance and financial products to our members.*

A vision is a picture of future success.

What are your lodge's values, mission and vision?

**SMART goals**

*(duplicate these two pages for each goal which you create for your lodge)*

My vision of success and the related plan of action:

Who will benefit:



SMART goal (Specific, Measurable, Attainable, Relevant and Timely):  
*(duplicate these two pages for each goal which you create for your lodge)*

Who:

What:

When:

Where:

Why:

How:

How Verified:

References:

*Bryson, John and Alston, Farnum - Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations.*

*Boy Scouts of America - Wood Badge for the 21st Century Staff Guide.*