

Chapter Kit for Strategic Planning

Note: To paraphrase a television commercial, do not try this exercise at home....
Unless:

1. You have selected a competent facilitator. An outsider is best, look for someone from a social service organization or a local college or maybe your district governor (if he/she is not from your chapter). It works best if an impartial outsider conducts the exercise. Insiders and especially club leaders can unintentionally color or lead the group and some members will find it dominated by strong personalities. It is essential that the forum be open and everyone has the chance to get their opinions expressed.
2. Don't forget to involve everyone. Club members, agencies you give support to, therapists in your community, and prospective member classes. You can learn a lot from outsiders' views of your chapter. Set a time and make sure everyone knows they are welcome.

Preface for Training

1. Share the purpose with them. 5 min.

Purpose: Frame the planning for them. Explain that you intended to accomplish:

- a. A planning exercise they can utilize with their club.
- b. How to do a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats)
- c. Develop a mission fulfillment list.
- d. Develop a vision statement for their club.
- e. Develop goals, objectives and strategies designed to reach their vision.
- f. Learn how to develop a club committee structure to achieve their goals, strategies and objectives.
- g. Learn how to delegate strategies so tasks are assigned and jobs completed.

2. Starter statements 5 min.

Pass the starter statement sheets out and ask participants to fill them out. Their questions and concerns will be addressed later in the planning.

Section ONE

1. SWOT Analysis 20 min.

A SWOT analysis is a self-examination of the organization that focuses on strengths, weaknesses, opportunities and threats. Divide your people into groups of six. Use a minimum of three if your meeting is not large enough. Each group is assigned one of the SWOT headings and sent to a breakout area or a round table discussion. Give each group several flip chart pages, a marker, their instruction sheet and the case study. Limit their time to 20 minutes.

Instructions to the groups:

- List as many items as you can that fit your groups' topic.
- Present your list and reasons for your selections to the entire group. Note! You won't be able to have verbal input from each group if the crowd is very large. Tape the results on the wall and lead a quick consensus of the results.

2. Consensus Building 60 min.

You will use this section to teach them how to build consensus among their chapter each step of the way. We will have the entire crowd prioritize each section of the SWOT analysis. We'll demonstrate how to do it using the opportunities, Group all the opportunity sheets together at the front of the room. Now, lead the group by asking for their input. What do they

think is the greatest opportunity? What's second, etc? What's not on the list but should be? Allow others to add to the list. Follow this process with each of the four parts of the SWOT analysis.

3. Conclusion

Recap for the crowd what they've learned to do. A good SWOT analysis is the important first step in developing their chapter strategic plan... and getting their membership involved.

Section Two

1. Mission statement fulfillment list

5 minutes

The mission fulfillment list exercise is designed to accomplish two things. First, it helps the group realize what they are presently doing to fulfill the mission. Second, it gets them to think about how they can expand, focus or otherwise change their efforts towards the mission. The effort also helps them decide whether they buy-in to the mission, and if not, what will their mission statement be? It is a statement what is used externally to inform the public and potential members about the chapter.

Vision Statement

The vision statement exercise is designed to force the groups to think about and design their future. It is an internal statement that builds agreement within the chapter about their goals and direction. It is used to show new and long-time members where the chapter is headed.

Instructions

Mission statement

30 min.

- Give half the groups a copy of the mission statement instruction sheet.
- Ask those groups to list how they fulfill the mission, again using the case study.
- If they wish, groups are allowed to recommend additions or changes to the mission statement. However, they should come back with their own list of how they fulfill or intend to fulfill the mission.

Vision Statement

- Give half the groups a copy of the vision statement.
- Ask those groups to develop a vision statement for their individual group, again using the case study.

2. Reports

- The groups report back and their results are taped to the wall. (Require a different presenter each time a group reports, if you use verbal reports.)

3. Consensus Building

30 min.

Use the same process as at the end of the first section. Strive to build a consensus from the crowd as to the mission and vision statements... what parts to they all like? What are the statements they can all agree upon?

4. Conclusion

1 min.

Remind them of what they've learned so far. They have completed the SWOT analysis and decided upon their chapter's mission and future vision.

Section Three

1. Develop Goals, Objectives, and Strategies

In this hour the groups will develop their own list of goals, objectives, and strategies. Instruct them that they must incorporate the results of the SWOT analysis; along with the mission and vision statement they created in the first two sections from the case study. The idea is to address your weaknesses, build on your strengths, take advantage of your opportunities, and guard against threats to your organization.

2. Group Exercise

30 min.

Instructions:

- Give each group the worksheets that define and list examples of goals, objectives, and strategies. Each group is given two categories of goals (these are generated by the strengths and opportunities). Their assignment is to construct goals, objectives, and strategies. Tell them that they should focus on developing at least two strategies for each objective that can be accomplished in the next club year.

3. Reports

30 min.

Groups report back with their results. Have them list their results on a pad. Here you should take time to let groups verbally report.

4. Conclusion

Remind them of what they've learned so far. SWOT analysis, developing mission and vision statements, and now they've completed goals, objectives and strategies to accomplish their dreams. They have stepped their dreams into reality,

Section Four

1. Correctly Appointing Committees

10 min.

- A. In this hour, you will present the talk "*Correctly Appointing Committees.*" This talk is designed to show them how to structure their club in light of the goals, objectives, and strategy work they've finished.
- B. Be sure to refer to the officer's monthly planner and show them the sample committee preference sheet. They can copy this sheet for their use, add to it, or customize it to their chapter. Remind them it's how they involve their members in the member's area of interest.
- C. You should complete this talk by pointing out to the presidents the Club Committee Guidelines. The guidelines are available from AMBUCS Resource Center or on-line and designed so that the president gives each committee chairman their respective part if the chapter feels the committee is needed.

2. Get Your Questions Answered

30 min.

The remainder of the hour is devoted to answering their questions from the starter statements collected at the beginning of the session. Use a small panel to field questions and give "expert" advice. You should be prepared to refer to the club officer planner.

You should also make them aware of resources available and how to access them.

3. Conclusion

2 min.

It is important to remind them of the learning process they have experienced this day. What did they learn?

- A. How to do the SWOT analysis.
- B. How to focus their chapter own their own mission and vision of the future.
- C. How to establish and design one year's part of their chapter's strategic plan. A plan every member contributed to and has ownership in and will work to compete.
- D. How to structure their chapter and successfully appoint committees to accomplish their goals and involve the members.

4. Evaluation

1 min.

Don't forget to ask each participant to fill out an evaluation form. This feedback is important to improve the educational experience.

Strengths

List every strength or positive aspect of your club. Do not question or critique suggestions. All ideas are OK. When your list is full, rank the list in order from greatest to least.

Example: Good, informative and entertaining programs at our club meetings.

Weaknesses

List every weakness or negative aspect of your club. Do not question or critique suggestions. All ideas are OK. When your list is fill, rank the list in order from greatest to least.

Example: Lack of public relations.

Opportunities

List every opportunity you perceive as open to your club. Do not question or critique suggestions. All ideas are OK. When your list is full, rank the list in order from greatest to least. (Remember your strengths and weaknesses)

Opportunity: a combination of circumstances favorable for the purpose; a good chance or occasion to advance oneself.

Example: Gain exposure through public relations.

Threats

List every threat or danger you perceive could affect your club. Do not question or critique suggestions. All ideas are OK. When your list is fill, rank the list in order from greatest to least.

Threat: An indication or potential source of danger or harm. Remember there are external (things happening in your environment) and internal (things happening within your club) threats.

Example: Only National dues are tax deductible.

Mission Statement

This is a proposed mission statement for AMBUCS. It's okay to offer your suggestions about it. Assuming you accept it, or have changed it, now list the ways your club fulfills the mission. Think of the mission statement as what you stand for, it's how you will quickly show anyone what your club's purpose is....

**AMBUCS is dedicated to creating
independence for people with disabilities.**

(List how your club fulfills the mission now)

(List now your club could fulfill the mission; remember your strengths and opportunities)

Goals... Objectives... Strategies

This exercise is designed to give you practice in "stepping dreams into reality." After completing this process, you should be able to lead your club in planning goals, objectives and strategies to fulfill your chapter's mission and vision of the future.

Your group will be assigned two broad categories of goals developed earlier in the SWOT analysis. Write the two categories here:

You have 30 minutes to develop your set of goals, objectives and strategies in these two focus areas.

First write a goal for each focus area.

A **goal** is defined as an end that one strives to attain...

For example, if the focus area is membership development the goal might be "The Ambassador AMBUCS will increase the number of active dues paying members to 75 by 2003."

Second, write at least two objectives for each goal.

An **objective** is defined as an aim for something striven for...

In our example, an objective is a subset of a goal, for example an objective to the above goal might be that the Ambassador AMBUCS want to increase their rate of membership retention by 1% per year for the next three years.

Last, write at least two strategies to accomplish in the next club year that will move the club toward reaching the goals and objectives.

A **strategy** is defined as an action based on achieving a goal or objective....

For example, a strategy for the Ambassador AMBUCS objective above might be to reactivate two members from inactive status this year.

Remember, it's important to address your weaknesses, build on your strengths, take advantage of your opportunities, and guard against your threats!!

Goal _____

Objective _____

Strategies _____

Goal _____

Objective _____

Strategies _____

Items Need for Strategic Planning Session

- Flip chart pads (two)
- Markers
- Masking Tape
- Copies of starter statements and other handouts for each exercise
- Treats to toss out to best groups or best idea contributors (helps make it fun)
- Room set in table rounds for group discussion, or some basis to facilitate small discussion groups.

Starter Statements

My biggest concern is...

I think my chapter needs to work on these things the most...

If I could fix just one thing about my club this year, it would be...

It's vital that today I learn...