

and mattering that will prepare us for an ever-changing and dynamic future. As a leader, your attitude must be one like of the optimist.

I don't believe that a pessimist could have hit that homerun back when I was in fifth grade. I thank Mark Davis for being a leader who gave me one of my first tastes of mattering. Since then, my own life has been filled with examples of why spirit-centered leadership can change not only organizations, but individual lives. The applause that erupted on the opening night of *Dandelion Theater* showed our troupe that a collaborative and cooperative team spirit can turn dreams into a reality that makes a difference for many others—that our efforts MATTERED.

In a world where individual effort rarely seems to count, the leaders of the organizations that make up our collective community need to embrace the power of spirit, creating an environment where their members want to be viable, mattering parts of the team.

That's the stuff softballs and dandelions are made of.

## CHAPTER SUMMARY

- ❑ A leader is responsible for modeling and engendering a positive spirit in their organization.
- ❑ Interpersonal communication is the lifeblood of spirit.
- ❑ Leaders empower members to empathically understand, appreciate and celebrate the diversity of all members as a foundation for an authentic and valuing organization.
- ❑ Leaders make intentional efforts to nurture spirit through thanks.
- ❑ Leaders challenge members to invest in spirit by encouraging feedback, engaging in open and honest dialogue and incorporating the resulting ideas into the policies and practices of the organization.

## On Strategic Planning

*The Voice of Rick Barnes*

*"If you don't know where you're going,  
you might end up somewhere else."*

— Yogi Berra

In any organization, a strategic plan is the basis for strong governance, effective leadership and sound management. It provides direction for the effective operation of the organization as a whole. The initiation of the plan often arouses interest and enthusiasm, serving as a catalyst for renewed purpose among the leadership and members of the group alike. By engendering pride in the deliberate and rational performance of the organization, a strategic plan unifies members in their commitment to a common vision and goals.

Without a vision, the future of any organization remains uncertain. Vision is closely tied to the establishment of a mission, which in turn provides direction for the plan for the future, a strategic plan for the continued development of the organization. Unfortunately, too many organizations avoid strategic planning, citing excuses ranging from lack of organizational time to the costs required for hiring consultants; moreover, when things are going well, leaders question the need for planning at all. Why fix what's not broken?

*"The task of the leader is to get his/her people  
from where they are to where they have not been."*

— Henry Kissinger

Getting others to where they need to be is next to impossible without a plan of action. Strategic planning is one of the most pow-

erful tools an organization can use to advance itself to the next level, to put forth a common purpose, and to fulfill the goals of its membership. In order to maintain the interest of the participants, a plan must offer opportunities for rapid, visible progress. It is critical to align all of the components of the organization in order to achieve the objectives laid out in the strategic plan. The plan answers much more than simply, "What are we going to do?" It also answers "How?" and "Why?" A strategic plan is literally the key to the future of the organization.

### Developing an Effective Tool that Works

Effective leaders, no matter what type of organization they work for, are able to identify problems, plan ahead and anticipate results. Most important, they need to understand how to implement a strong strategic plan by setting direction and priorities. Leaders depend upon a plan to serve as the "syllabus" for the organization, using it to establish the minimum expectations for progress, institute deadlines for the attainment of goals, and project the desired outcome.

We all depend on planning in our daily lives. Have you ever tried to embark upon a weight loss plan? First you try to decide whether you need to lose weight, envisioning how different you might look, or how much better you might feel, five or ten or even twenty pounds lighter. Perhaps you think about it privately; maybe you talk it over with a good friend, a spouse, a parent or a colleague. Once your vision leads to a goal (i.e. I'm going to lose fifteen pounds by Thanksgiving), you set about to plot out a plan of action. You establish a series of objectives in support of your goal. You begin to watch what you eat, start a program of regular exercise, and figure out how to achieve more balance in your life. You might turn to others for assistance as you develop your plan (a published diet plan, your family doctor), and continue to ask for their support as the weeks go by and you get closer to meeting your goal.

Once you begin your campaign to lose weight, you don't set your plan aside. Instead, you refer to it regularly, keeping track of

what you eat and weighing yourself regularly to see how many pounds you are losing, always with one eye on your final goal. You may turn to those around you for input and direction, visiting your doctor to make sure your body is responding well to its new regimen or a dietitian to help you choose the right foods for a healthy lifestyle. A fitness specialist might give you advice about the best form of exercise for your body and how to adjust your workouts as you become more fit. Each of these consultants provides direction according to the ultimate goal that you have set for yourself in your weight loss plan.

Finally, as Thanksgiving approaches, you step on the scale and discover you have lost those fifteen pounds. You applaud your progress and so do those around you. Thanks to the successful completion of your plan, you are healthier, stronger and more committed to a wholesome way of living. As the leader of your own personal organization, you have helped to initiate, continue and achieve the vision promulgated by your strategic plan. And now you work to maintain your desired weight, continuing to watch what you eat, evaluating your continued commitment to the plan, etc.

### STEPS TOWARD A STRATEGIC PLAN

There are seven specific steps involved in strategic planning which include the following:

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|-------------------------------------|-----------------------------|
| <i>Step I. Vision</i>               | <i>Step V. Strategies</i>   |
| <i>Step II. Mission</i>             | <i>Step VI. Activation</i>  |
| <i>Step III. Plans for Planning</i> | <i>Step VII. Evaluation</i> |
| <i>Step IV. Goals/Objectives</i>    |                             |

#### Step I. The Vision

The development of a *vision* is the initial stage in the strategic planning process. Imagine your organization five, ten, fifteen years from now. What do you see? As you lead this brainstorming session

with the members of your group, try to discover the dreams you have in common. Our hopes and dreams pull us into the future. This vision of the ideal future is the foundation of your strategic plan, the first tentative step toward fundamental change. Without a concrete vision, it is impossible to move forward in the process of planning. The members of any organization have to be able to envision the end result; a vision provides a clear picture of the goals they are trying to achieve—together. It is important that your members can see their own dreams encapsulated in the vision for the organization; if they believe their personal goals are a critical part of the overall purpose, you can count on them to get involved and stay involved. Vision is much more than “what ought to be.” It represents specific aspirations in which members believe deeply, their very personal desires for the future. Do not underestimate the importance of this process; establishing a vision provides an outcome-oriented endpoint around which the entire organization can rally.

#### Helpful Tips for Visioning:

- Consider, exactly what difference is it that you and your organization want to make.
- Clarify problem areas rather than exploit them.
- The vision must come from the heart—specific aspirations in which members deeply believe.
- Organize various visions into common themes—leads toward overall areas to focus on when writing the actual strategic plan.
- Do not get mixed up between the desire simply to do something rather than doing something good.

### Step II. The Mission

If you are struggling to identify a purpose for your group, imagine what things might be like if you didn't exist. What would be missing

in your community, your industry or your profession? What special contributions do you make? The answers to these questions will help reveal the ideal purpose, or *mission* of your organization. Mission defines “why” behind the “what” it is that you are here to do. It is an overall guide for direction, establishing the basic justification for the organization's existence.

Mission can often be expressed in brief statements. Think of some of the slogans you've seen on television or in print advertising: “The Ultimate Driving Machine,” “Nothing Runs Like a Deere,” or “We Love to Fly, and It Shows.” These mission statements, all very public statements of intent and desire, reveal the fundamental mission of each of these major companies. In their effort to create a public image, they also provide direction for all those within the organization who accept responsibility for its success. A powerful mission statement should include six critical components which are presented below.

#### Mission Statements

##### 1. Mission statements should always utilize results terminology.

The difference between results and consequences is that results are what you expect while consequences are what you get. Therefore, it could be safe to expect that if your expectations are positive, your results will be as well. Your mission statement should express what you expect. It should state the results you expect from your actions, from the things your organization does.

##### 2. Mission statements should be succinct in presentation, using few words and sentences.

The Mission is the guide—it's not the act itself. It provides direction, it is the core for all you do, it is the synthesis of how your organization is seen. It should be brief. It should be written in such a way that is easily remembered and understood. Short enough to put on a card in every office. Brief enough that it can be stated clearly by every member or employee.

**3. Mission statements should use authoritative generation, making sure to involve all members in the process of mission development.**

The development of the Mission should involve all members of your organization. The members, in fact, will be expected to use it as their guide. The old adage, you tend to support the things you help to create, stands true for the mission of your organization. The various constituencies should be utilized through open opportunities to provide direction to the Mission Statement.

**4. Mission statements should use vertical generation, connecting the leadership to the general membership of the organization.**

It is the job of the leader to see that planning takes place and that it is done well. It is also important that the leaders actively participate in the process. However, the statement should also include active involvement from the entire membership. As a result of equal participation from all levels of the organization, the Mission serves as an appropriate statement for the organization as a whole.

**5. Mission statements should use horizontal generation, encouraging ownership of the mission at all levels within the group.**

As in item number four, the development of the mission should come from all members of the organization. Ownership of the mission statement must also come from all levels. Again, one tends to support the things one helps to create. For the mission statement to serve in the most effective manner it must be held by all members of the group.

**6. The mission it promulgates should be pervasive, visible everywhere within the organization.**

On the wall in the board room, at the top of meeting agenda's, on the cover of staff handbooks, everywhere you look, the mission must be visible and readily understood by the members of the organization. It should permeate all levels, from the top leader to the newest member. The mission should guide all decisions of the organization.

The mission, honestly, provides direction for the overall operation of the group as a whole.

**Tips for Writing a Mission:**

- Involve all levels of the organization in the process.
- Short and simple is always better than long and confusing.
- Reflects the major values of the organization.
- The mission defines the “why” behind “what” you do.

### **Step III. “Plans” for Planning**

After you have established the parameters of your vision and produced your mission statement, you must prepare for the initiation of your *plan*. Measure the existing strengths and weaknesses of your organization—to establish a baseline, if you will. Where are you today in comparison to where you want to be in the future? How are you doing in terms of finances, personnel, resources, technology, attitudes, commitments and so forth? What are your growth trends, leadership changes, policy trends? What are your external opportunities and threats, including demographic, political, economic and technological trends? What are the national, regional, state and local trends? You must make the time and effort to educate your members about outside influences and surrounding issues that affect the health and future of your organization. What are the things around you that might create or restrict opportunities for change?

Review your responses first, narrowing to the choices that will be readily available to you. At this early point in the planning process, any option can be considered a good one. The diversity of your group should engender multiple answers to questions about the appropriate direction for the organization, based on your common vision. As these options are narrowed in the course of discussion, they will lead naturally to the adoption of choices appropriate to the specific desires of your group. The planning process always focuses on implementation, asking not only “why?” but

“how?” If one of the goals for the organization is to expand the membership, you must ask “how?” If the answer is to begin a membership drive, you must ask “how?” If the answer is to develop a plan of action, you must ask “how?” If the answer is to appoint a membership committee, you must ask “how?” This ongoing process of question and answer leads, very simply, to a step-by-step plan toward the ultimate fulfillment of the goal—in this case, membership growth.

#### Tips for Planning for the Strategic Plan:

- It is important to determine where you currently are in comparison to where you want to be.
- In processing through planning, ask not only “why” but “how?”
- The notes from the planning stage will lead directly to the written Strategic Plan.

### Step IV. The “Meat” of the Plan— Goals and Objectives

*“You have to know where you are going,  
be able to state it clearly and concisely—  
and you have to care about it passionately.”*

— Tom Peters

Assuming you have successfully defined a vision for your organization and you understand your mission, you have reached the point in the strategic planning process where you must develop a series of *goals and objectives* that will lead you toward the fulfillment of that vision.

Goals, and their related objectives, are major strategic intentions that will lead your organization into the future. Your goals relate directly to your mission statement. Although they are specific statements of intent, goals also highlight broad areas of responsibility consistent with the mission of the organization. In setting goals you should limit yourself, selecting no more than five

to ten at a time. Anything beyond that number and you will become bogged down with specific details of the organization. These details are the work of the membership in fulfilling the ultimate goals and the organization.

Your goals and objectives should be precise, measurable, result-oriented statements of progress. In other words, goals specify what needs to be achieved within a given period of time as you work to realize the overall strategic plan. Resist the temptation to dream up lofty statements. The members of your group should prioritize goals, determining which are of most immediate importance. The lower the priority, the longer you have to achieve them. However, do not eliminate those goals that at first seem less pressing. As you review your plan on a regular basis, you will most likely need to adjust your goals according to ongoing progress and development within the organization. A less important goal today may become your first priority tomorrow.

#### Tips for Goals and Objectives:

- A few specific goals are always better than lots of general statements.
- Goals should always be measurable.
- Do not set a goal too tough OR too easy—achieving a goal is a positive experience, which encourages you to achieve more goals. While goals should challenge, they should also be attainable.
- Make sure your short-range goals are consistent with your long-range goals.
- Goals should always be stated positively rather than negatively.

### Step V. Developing Action Strategies

The establishment of goals and objectives will almost certainly lead to a call for specific changes within your organization. One of the first areas for review may be personnel. You may discover a need for

additional staff or volunteer leaders. A change in leadership, both in terms of specific roles and individual commitment, may be necessary for the organization to institute positive changes. By setting the right direction and appropriate priorities, you will be able to empower the membership as you assign responsibility for specific parts of the plan.

It is likely that a review of your budget will be necessary. The planned use of resources should reflect support for the strategic plan. Some *strategies for action* may also call for fundamental changes in the organization's rules and regulations, or even the bylaws, while others may require only revised committee appointments or adjusted volunteer commitments within the group. All components of the organization must be reviewed to ensure they are aligned in such a manner that will serve to achieve the goals and objectives outlined by the plan. The period of transition and transformation that may follow is important, but it should not delay the progress of the group. It may simply be an opportunity to shift gears from what was to what is yet to be.

#### Tips for Action:

- Let your goals run your organization—if the goals require changes (personnel, leadership, etc.), then make the appropriate change.
- Let your goals run your budget—if the goal was important enough, don't let it die for lack of resources.
- Make sure your rules/regulations are compatible with the goals of your organization.

### Step VI. Activation of the Plan

In initiating your organization's commitment to its new strategic plan, you might want to kick off the process with a public announcement and an official celebration. This will offer an opportunity for you to formally reflect on the past, reviewing the steps that have taken you this far, to thank those who have played

critical roles in your success, and to recognize your progress to date. Such a public observance signals a point of departure from the past and a step into the future for your organization. It will allow you to share the plan with others, as you make an official acknowledgment to your supporters and shareholders. You will be able to rally your members as you each take that step forward in formal commitment to the new direction outlined by your strategic plan.

#### Tips for Activating the Plan:

- Look for the best way to kick off your new plan (public statement, organization rally, etc.).
- Make sure the new plan is shared widely and that those within the organization can explain and defend its statements.
- This is a point of new beginning—recognize it as such.

### Step VII. Ongoing Evaluation

It is critical that you develop a reliable system for assessing, monitoring and *evaluating* the progress of the strategic plan. While evaluation may remain the primary responsibility of the leadership, or executive board, you may also find it necessary to formalize the assessment process by appointing a specific committee of members. A single member should be assigned to lead this process, charged to report regularly to the membership about how successful the organization has been at remaining "on plan." If it is diligent in its duties, the members of this committee may very well be the first in your organization to recognize the need to revise the plan itself or to suggest adjustments that will better meet the stated goals and objectives.

#### Tips for Evaluation:

- Evaluate, evaluate, evaluate—measure all you do against the purpose for doing it.
- Measure—if you were successful, how successful; if you need more work, how much more work.

- Document—be the best you can be, but utilize your evaluation to help the next group be even better. Ongoing progress and development is the ultimate goal.

### Review of Strategic Planning

- Step I. Vision – *what do we want to be?*
- Step II. Mission – *the reason for being.*
- Step III. Plans for Planning – *costs/assets/facilities/staff, etc.*
- Step IV. Goals/Objectives – *statements of measurable results.*
- Step V. Strategies – *how to reach objectives.*
- Step VI. Activation – *initiate the plan.*
- Step VII. Evaluation – *review and revise.*

*“Meticulous planning will enable everything you do to appear spontaneous.”*

– Mark Caine

### Ongoing Process

Change is, of course, at the heart of strategic planning, yet the essence of good planning lies in balancing necessary changes and high standards of continuity. As you move forward in your strategic planning process, you will continue to have the opportunity to reflect upon those things you do well. By encouraging the strengths of your organization and implementing new ways to make it even better, the plan will lead you toward continual progress and development.

It is important to link all items on your organization's agenda to the strategic plan. You will find that small, incremental steps will take you far toward the fulfillment of the plan. The challenge before the group is to recognize that the strategic planning process, once set in motion, is a permanent guide that provides clear direction and purpose for the organization. As the plan is formally reviewed on a regular basis, it will lead to new visions, new thoughts, new ideas, new goals, new objectives. You should consistently re-

quire staff and volunteers to report on key accomplishments in the context of the plan. Moreover, the leadership itself must be prepared to recommend revisions in the overall process.

A common commitment to pursuing a shared vision through ongoing strategic planning is the key to the continued progress and development of your organization. A strategic plan, implemented correctly, can reenergize the membership and create a more enjoyable and successful organization. It all begins with a dream—a vision for the future. Vision leads to a plan of action, utilizing goals and objectives. The plan that results produces positive change and a dedication to progress, serving as a catalyst for the renewed vitality of the leadership in its ongoing direction of the group. The Strategic Plan ensures a commitment to a common vision and a common purpose, vital for the effective operation of any organization.

*“If you can dream it, you can achieve it.”*

– Walt Disney

### CHAPTER SUMMARY

- Strategic planning is the basis for effective leadership.
- The anticipation of potential problems is part of the planning process.
- Six specific steps allow the leader to initiate, direct and achieve the group's vision.
- Personal objectives can also be achieved through strategic planning.
- Mission statements direct the leader's energies.