

Planning for the Future

Collaborative Strategic Planning

Section E6 Indian Winter
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Instructor Info

From Huntsville, AL

Coosa Lodge

- Associate Lodge Adviser
- History Committee Adviser
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Favorite Movie:

- Bill & Ted's Excellent Adventure



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Why is planning important?

- “Proper Prior Planning Prevents Poor Performance”
- “Fail to Plan” = “Plan to Fail”
- Typical planning is focused on a single event, objective, etc.



What is strategic planning?

- Strategic planning is the organizational process of using available knowledge to document an organization's intended direction. This process is used to prioritize efforts, effectively allocate resources, align stakeholders and members on the organization's goals, and ensure those goals are backed by data and sound reasoning.

Harvard Business School: <https://online.hbs.edu/blog/post/why-is-strategic-planning-important>

- How is this different from your typical planning session?
 - Typical planning tends to be focused on smaller, shorter-term goals. (WHO, WHAT, WHEN, WHERE)
 - Strategic planning helps align those goals are aligned with your organizational vision. (WHY)
 - The difference is BIG PICTURE vs LITTLE PICTURE.



Benefits of Strategic Planning

- Create a single, forward-focused vision.
- Become proactive rather than reactive.
- Build a shared sense of purpose and responsibility.
- Manage expectations and improve trust.
- Recognize bias or flaw in your decision making.
 - **Recency Effect** – Tendency to select the option presented most recently b/c it's fresh in your mind.
 - **Occam's Razor** – The tendency to assume that the most obvious answer is the best answer.
 - **Inertia Bias** – The tendency to select options that let you think, feel, and act in familiar ways.
 - **Confirmation Bias** – The tendency to favor information that supports what you already believe.



SWOT Analysis

- SWOT analysis is a common framework for identifying and analyzing an organization's:
 - **S**trengths
 - **W**eaknesses
 - **O**pportunities
 - **T**hreats
- This will help identify clear objectives, informed by a comprehensive understanding of your capabilities, your capacity, the things you can control, and the things you can not control.



SWOT – Strengths & Weaknesses

- These are INTERNAL factors, which means that these are generally THINGS YOU CAN CONTROL.
- **Strengths** – These are things that you do well or generate POSITIVE impressions.
- **Weaknesses** – These are things that you do NOT do well or generate NEGATIVE impressions.

- PRO TIPS:
 - Don't be too modest when listing your strengths. If you're having difficulty naming them, start by simply listing your characteristics (ex: We have a good reputation among camp staff.). Some of these will probably be strengths.
 - Identify strengths and weaknesses from both your own point of view and that of others, including those you serve. Do others see problems (or assets) that you don't?



SWOT – Opportunities & Threats

- These are EXTERNAL factors, which means that these are generally THINGS YOU CAN NOT CONTROL.
- **Opportunities** – These are things that could make you better or improve your reputation.
- **Threats** – These are things that could negatively affect you or damage your reputation.

- Sometimes it can be hard to tell if something is a threat or an opportunity. It will depend on your strengths and your weaknesses!



SWOT Analysis – Summary



Knowledge into Action

- Now that you have identified these key areas, it's time to ask some deeper questions:
 - Which **strengths** can you use to capitalize on your **opportunities**?
 - Which **weaknesses** are stopping you from taking advantage of your **opportunities**?
 - Which **strengths** can help you minimize external **threats**?
 - Which **weaknesses** can be exploited by external **threats**?
- The answers to these questions will help you develop organizational goals!



SWOT>TOWS



SMART Goals

- Use “SMART” goals to create clear, achievable, and meaningful goals.
 - **Specific** – A clear goal that answers the 5 Ws (Who, What, When, Where, Why)
 - **Measurable** – A goal with a way to track progress or success
 - **Attainable** – A goal that is realistic and can be accomplished within a reasonable timeframe
 - **Relevant** – A goal that is relevant to your situation or needs
 - **Time-Bound** – A goal with a specific deadline or timeframe.

Many of you have seen this at IOLS, NYLT, NLS, or Wood Badge!

It's time to put that knowledge to use!



Example – Red Wolf Lodge #6

- Strengths:
 - Fall Fellowship is our best and biggest event of the year.
 - We have an awesome callout ceremony at summer camp.
 - Our members have a lot of pride in being members of the lodge.
 - Patch designs are AWESOME.
- Weaknesses:
 - Our new member activities during induction weekends are boring.
 - Our communications (website, newsletter, social media) are inconsistent.
 - We don't have enough ceremony teams.



Example – Red Wolf Lodge #6

- Opportunities:
 - Upcoming council-wide encampment/camporee.
 - Patch collectors are interested in a new trade-o-ree event.
 - National is rolling out new ceremonies to remove all AIA aspects.
- Threats:
 - Some Scouts and parents have told us the “Indian stuff” is kind of weird.
 - Some Scoutmasters believe the OA “steals” their best Scouts.
 - National is rolling out new ceremonies to remove all AIA aspects.



Example – Red Wolf Lodge #6 (TOWS: S/O)

Strengths:

- Fall Fellowship is our best and biggest event of the year.
- We have an awesome callout ceremony at summer camp.
- Members have a lot of pride in being part of lodge.
- Patch designs are AWESOME.

Opportunities:

- Upcoming council-wide encampment/camporee.
- Patch collectors are interested in a new trade-o-ree.
- National is rolling out new ceremonies to remove all AIA aspects.

How can we use our **STRENGTHS** to capitalize on these **OPPORTUNITIES**?

SMART Goals:

- Provide an OA Service Corps (like Operation Arrow at Jamboree) to serve the upcoming encampment.
- Recruit the best call-out ceremony team to ensure that this summer's ceremonies are the best yet.
- Attempt to schedule a trade-o-ree in the next lodge program year.



Example – Red Wolf Lodge #6 (TOWS: W/O)

Weaknesses:

- Our new member activities during induction weekends are boring.
- Our communications are inconsistent.
- We don't have enough ceremony teams.

Opportunities:

- Upcoming council-wide encampment/camporee.
- Patch collectors are interested in a new trade-o-ree
- National is rolling out new ceremonies to remove all AIA aspects.

Where do our WEAKNESSES limit our ability to capitalize on these OPPORTUNITIES?

SMART Goals:

- Create a communications plan/calendar for all future OA activities.
- Host an OA village or similar activity area at the camporee to reconnect with inactive members.
- Investigate the problem with recruiting ceremony teams. (If the problem is that they don't have any regalia, for example, maybe the new ceremonies will solve that problem for you. But you will still need to recruit new ceremony teams!)



Example – Red Wolf Lodge #6 (TOWS: S/T)

Strengths:

- Fall Fellowship is our best and biggest event of the year.
- We have an awesome callout ceremony at summer camp.
- Members have a lot of pride in being part of lodge.
- Patch designs are AWESOME.

Threats:

- Some Scouts and parents think the “Indian stuff” is kind of weird.
- Some Scoutmasters believe the OA “steals” their best Scouts.
- National is rolling out new ceremonies to remove all AIA aspects.

Where can our **STRENGTHS** help mitigate these **THREATS**?

SMART Goals:

- Create a “Scoutmaster Outreach” plan to invite all Scoutmasters to Fall Fellowship so they can get a better idea of what the OA is all about and how it can help their units. (Maybe create a special patch for them?)
- Assemble a task force to review the callout ceremony, identify the important pieces, and prepare to update it once the new ceremonies are released.



Example – Red Wolf Lodge #6 (TOWS: W/T)

Weaknesses:

- Our new member activities during induction weekends are boring.
- Our communications are inconsistent.
- We don't have enough ceremony teams.

Threats:

- Some Scouts and parents think the “Indian stuff” is kind of weird.
- Some Scoutmasters believe the OA “steals” their best Scouts.
- National is rolling out new ceremonies to remove all AIA aspects.

Which of our WEAKNESSES can be exploited by these THREATS?

SMART Goals:

- Recruit at least two new ceremony teams to quickly learn and study the new ceremonies. (What if your ceremony teams hate the new ceremonies? They might just quit!)
- Communicate early and often to members, parents, and units about upcoming events, program activities, etc.
- Create a plan to make time outside of the Ordeal more interesting or exciting. (Games, movies, cracker barrel, etc.)



Making it Collaborative

- What does that mean?
- Who should be invited?
- What do you need?
- How long should it take?



What does “collaborative” mean?

- It means that everyone has an opportunity to share their input, but it doesn’t mean that everyone has to be “in the room.”
 - Invite members and alumni to share their feedback in writing (emails, surveys, etc.)
 - Ask for feedback from Scout Executive, Camp Ranger, Camp Director, Unit Leaders, etc.
- Once you’re “in the room”, remember that you’re all there for a common purpose.
 - You’re all doing your best to help your lodge be its best.
 - You might not agree on what “best” means, and that’s okay!



Who should be invited?

- Key leadership and major stakeholders:
 - LEC, Lodge Adviser, Staff Adviser, Scout Executive
- Key “customers”:
 - Scoutmasters, new members, non-members
- Anyone else with a useful or unique insight into your lodge.

The goal is to provide a comprehensive insight into the lodge!

Avoid creating an “echo chamber”!



What do you need?

- Pens & Pencils
- Notebooks
- Post-It Notes
- Dry Erase Markers & Erasers
- Name Tags
- Drinks & Snacks
- ... anything else?



How long should it take?

- Surveys should be sent a few weeks before the work session. This will give everyone enough time to complete the survey, then your survey team needs enough time to generate their results.
- The actual work session is an intense process that should take more than an hour or two.
 - Plan for at least a “long day” (10 AM to 4 PM?) with lunch provided.
 - Some lodges might want to make this a weekend event.
 - Friday – Welcome, icebreakers, etc.
 - Saturday – Work session, goal development
 - Sunday – Review, path ahead
- This will depend on your specific needs and interests!



Review

- Strategic planning is the process of using available knowledge to establish your intended direction.
- SWOT/TOWS analysis is a common framework for this.
 - This process might be uncomfortable at times! Remember that you're all on the same team.
- Collaboration is an essential key to success, and there is an opportunity for everyone to be involved.
 - Avoid creating an echo chamber! Invite diverse opinions and perspectives.





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