How and Why of Strategic Planning

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Mentor       B’nai B’rith Director  Board Member
Why are you here? Introductions
Planting the seeds
Agenda:

- Why Strategic Planning?
- How of Strategic Planning?
- What is in a Strategic Plan?
- Working with Grinspoon on Strategic Planning
- Impact: Camp B’nai B’rith
  - Mission Statement
  - Facilities Master Planning
  - Legacy Fundraising
- Tips and Truths
Why Strategic Planning
GIJP Way:
How to Create a Great Camp

Fundraising  →  Board Governance  →  Strategic Planning  →  Fundraising

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Purpose of Strategic Planning: Alignment

What direction is the camp moving in?
Purpose of Strategic Planning: Alignment
If you are working on something exciting that you really care about, you don't have to be pushed. The vision pulls you.

Stephen Jobs
From Vision to Results

1. Vision

2. Strategic Goals

3. Actions Identified

4. Take Action
Strategic Planning Cycle
How of Strategic Planning

Step by Step:

decision making to get started right
Grinspoon 3 options

- Comprehensive Strategic Planning: 9-12 months
- Strategic Positioning: 5 to 6 months
- Condensed Organizational Planning: 2 to 4 months
Option 1: Comprehensive Strategic Planning  9-12 months

Pros:
- Wide outreach and engagement with organizational stakeholders including participation of more staff
- Full review and analysis of different aspects of the organization
- Time devoted to process lends itself to deeper discussion of relevant issues

Cons:
- Increased length of time needed for committee members to commit to the process
- Increased organizational resources devoted to information gathering and stakeholder involvement
- Longer time period might delay resolution of some key issues
Option 2: Strategic Positioning
5 to 6 months

Pros:
- Shorter time frame
- Less organizational resources necessary
- Deep focus on selective critical issues

Cons:
- Fewer stakeholders (including staff) are involved and therefore there is a risk of not obtaining all relevant information
- Focus on limited number of critical issues might overlook some key organizational areas that need attention
Option 3: Condensed Organizational Planning 2-4 months

Pros:
- Much shorter time frame
- Full board involvement
- Critical organizational issues are faced head-on
- Time-limited dedication of resources

Cons:
- Upfront investment of time for staff and Executive Committee
- Intense commitment of time from all Board members
- Stakeholders other than Board are not involved and therefore there is a higher risk of not obtaining all relevant information
- Focus on limited number of critical issues might overlook some key organizational areas that need attention
- Shorter time frame risks coming too quickly to conclusions or proposed solutions and foregoing deeper analysis
Strategic Planning

VISION for Camp

Choose Strategic Planning Leadership

Clarify Process: Time and Structures

Get Stakeholder Input: Internal and External

Identify and Prioritize Strategic Goals and Critical Success Factors

Create Strategic Plan as Living Document
Initial Planning
- Goals
- Advance scheduling
- Links to other processes
- Links to other event

Roles
- Key people
- Key tasks
- Time Commitments
- Shared agreements

Framing
- Time horizon
- Burning issues

Mission & Vision

Data Collection

Synthesis & Decisions

Output
What’s in a Strategic Plan?
Camp Ramah in the Berkshire’s 7 Strategic Goals

- 1. Jewish Education
- 2. Year-Round Program
- 3. Camp Program
- 4. Staff Leadership
- 5. Facilities
- 6. Development
- 7. Board Leadership
Camp B’nai B’rith Strategic Goals

Mission

- Governance
- Marketing
- Fundraising
- Facilities
- Program

Projected Budget
Strategic Plan Outline for Goals/Critical Issues

S.M.A.R.T. Action Items:

S = Specific
M = Measurable
A = Attainable
R = Relevant
T = Time-bound

Strategic Goal Area

Goal Statement:
Current Status:
Opportunity Statement:

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<th>Action Item</th>
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Impact of Strategic Planning

Camp B’nai B’rith

- Michelle Koplan, Executive Director
- Irv Potter, Board Member
Tips

- Start with a core planning group and pull in new leadership
- Document a “plan to plan” before you start
- Work in parallel if opportunities become clear
Truths

- Each Mentor is different in style and approach
- Option to hire outside of Grinspoon (RFP)
- Takes time
- Once is ever enough
Questions?