

# How and Why of Strategic Planning

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# Why are you here? Introductions

# Planting the seeds

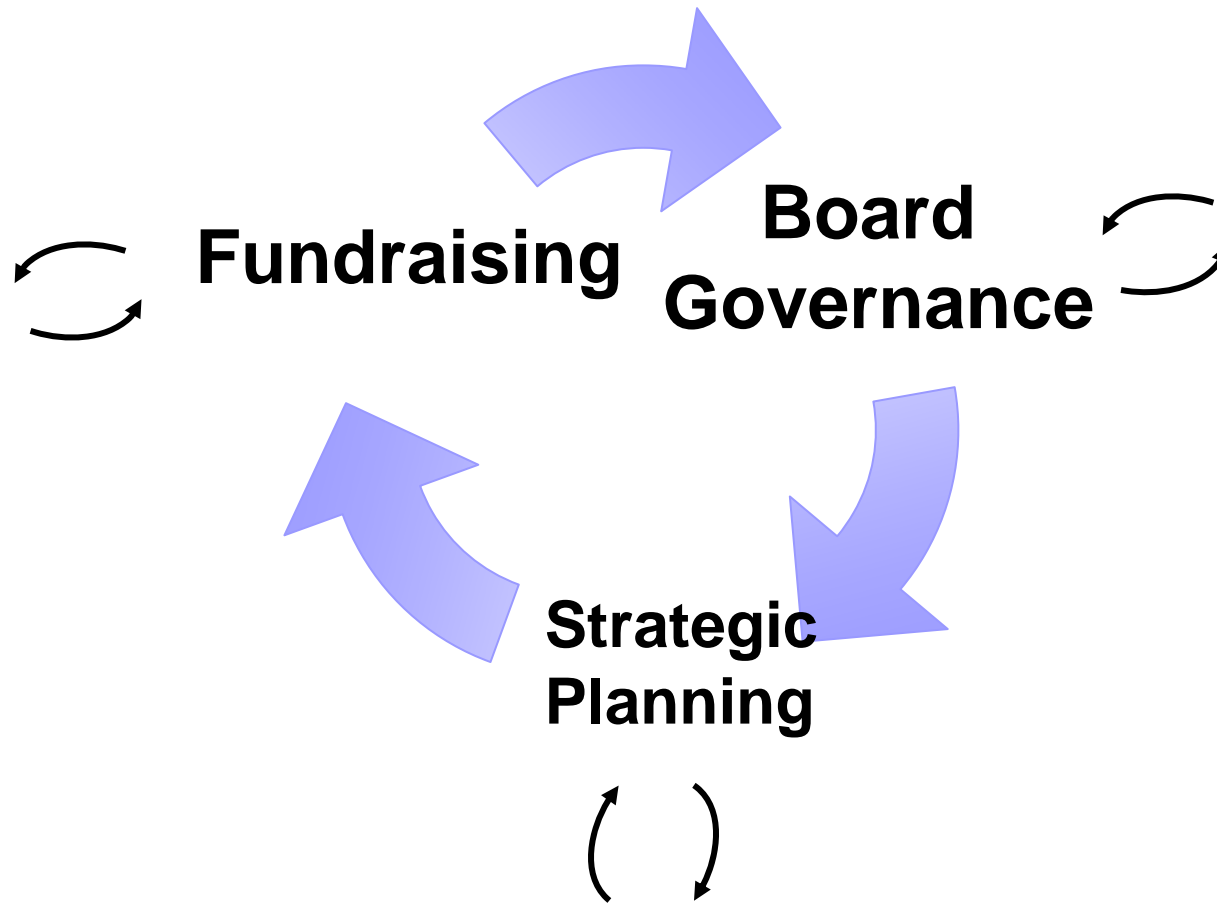


# Agenda:

- 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

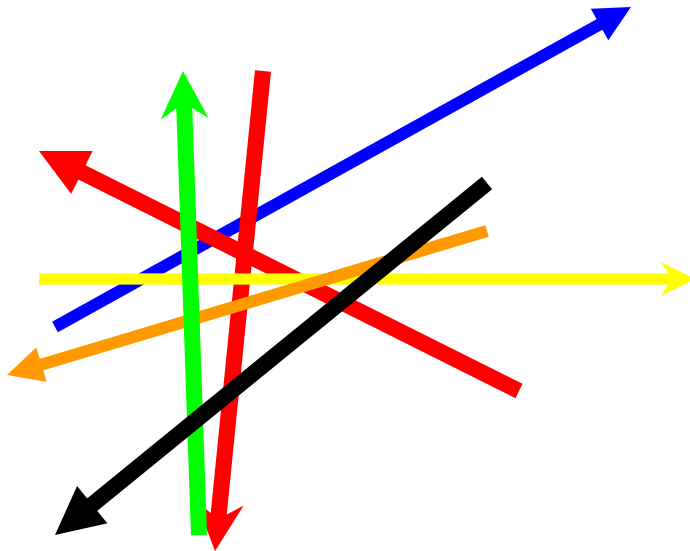
# Why Strategic Planning

# GIJP Way: How to Create a Great Camp



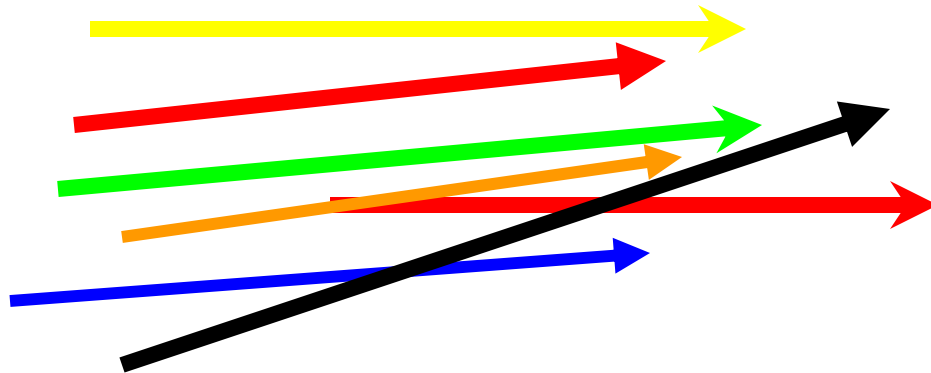
# Purpose of Strategic Planning: Alignment

What direction is the camp moving in?

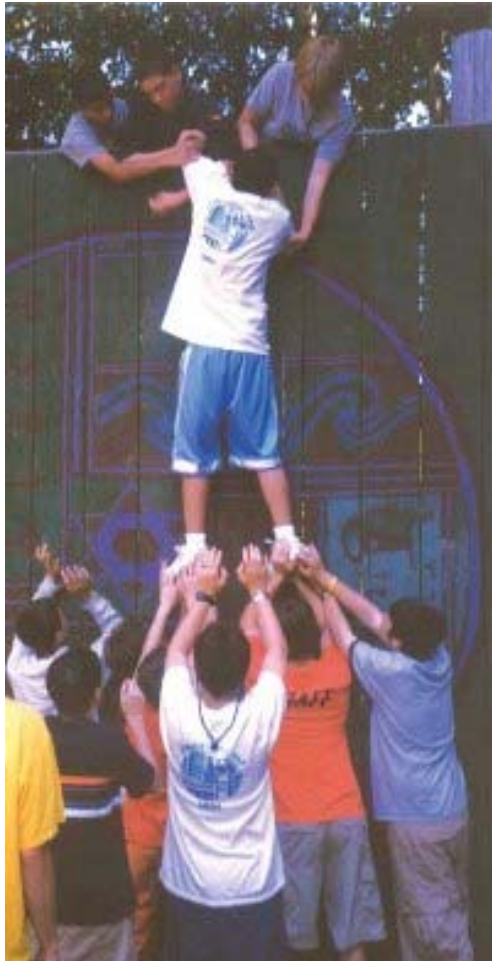


# Purpose of Strategic Planning: Alignment

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If you are working on something exciting that you really care about, you don't have to be pushed.

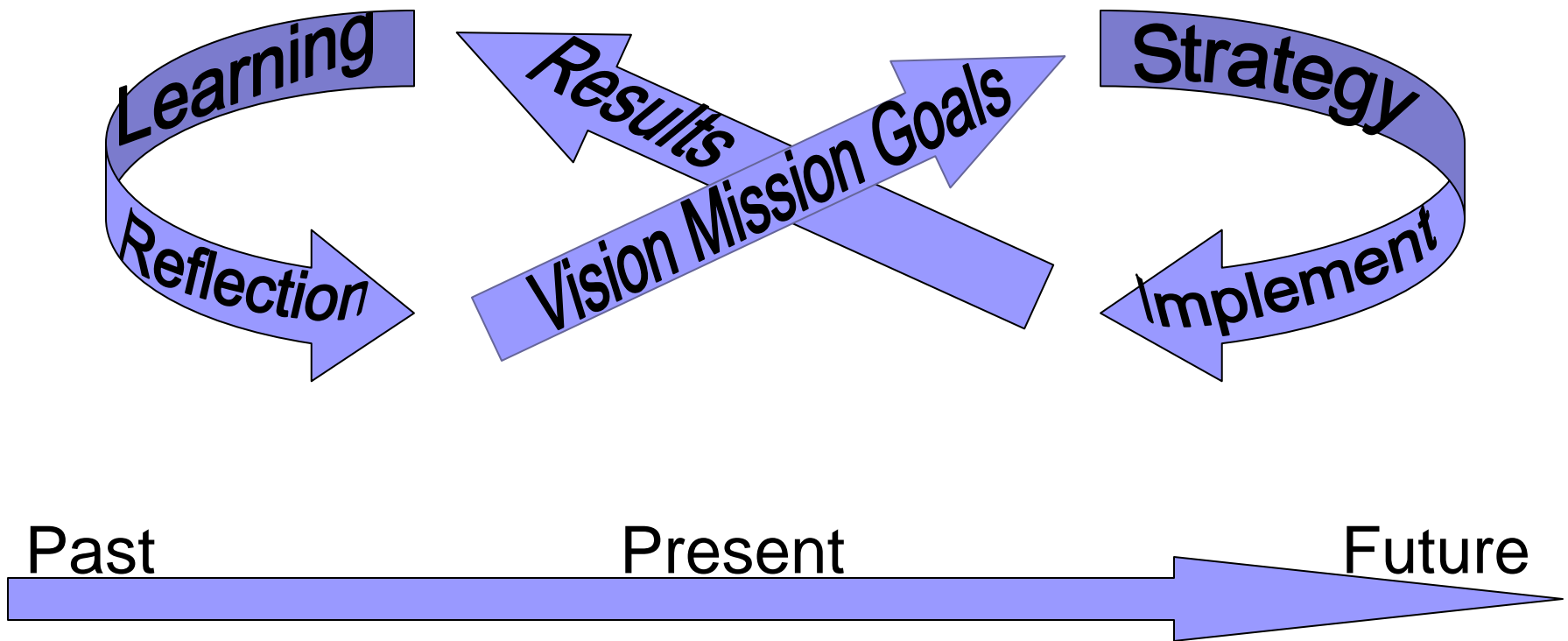
The vision pulls you.

*Stephen Jobs*

# From Vision to Results



# 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:

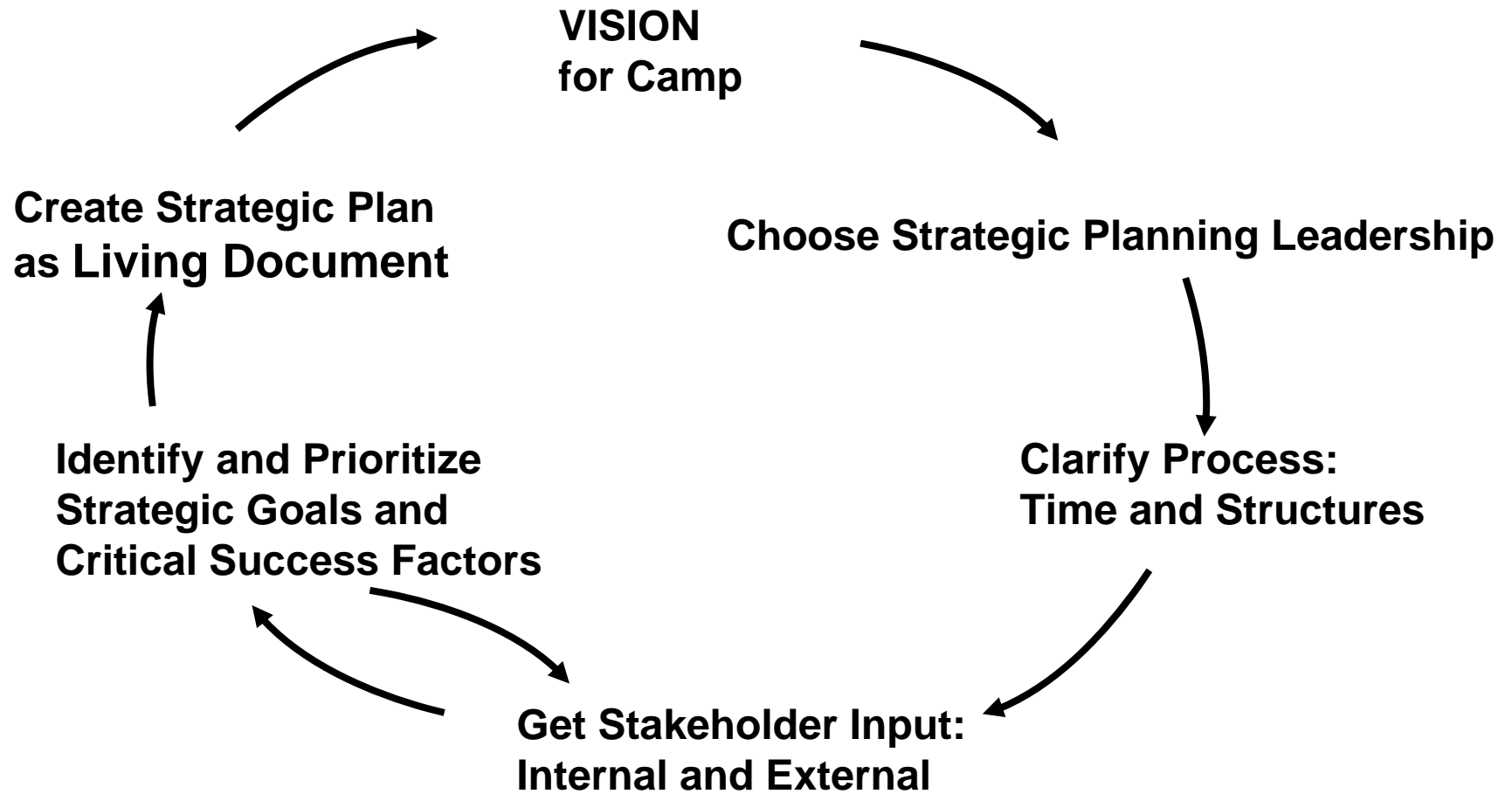
- Much shorter time frame
- Full board involvement
- Critical organizational issues are faced head-on
- Time-limited dedication of resources

## Cons:

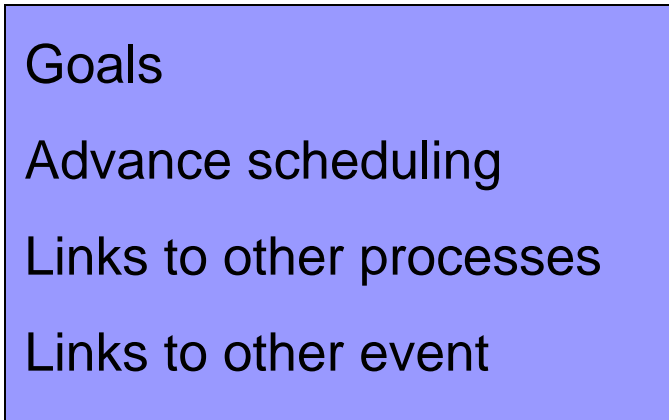
- Upfront investment of time for staff and Executive Committee
- Intense commitment of time from all Board members
- Stakeholders other than Board are not involved and therefore there is a higher risk of not obtaining all relevant information
- Focus on limited number of critical issues might overlook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



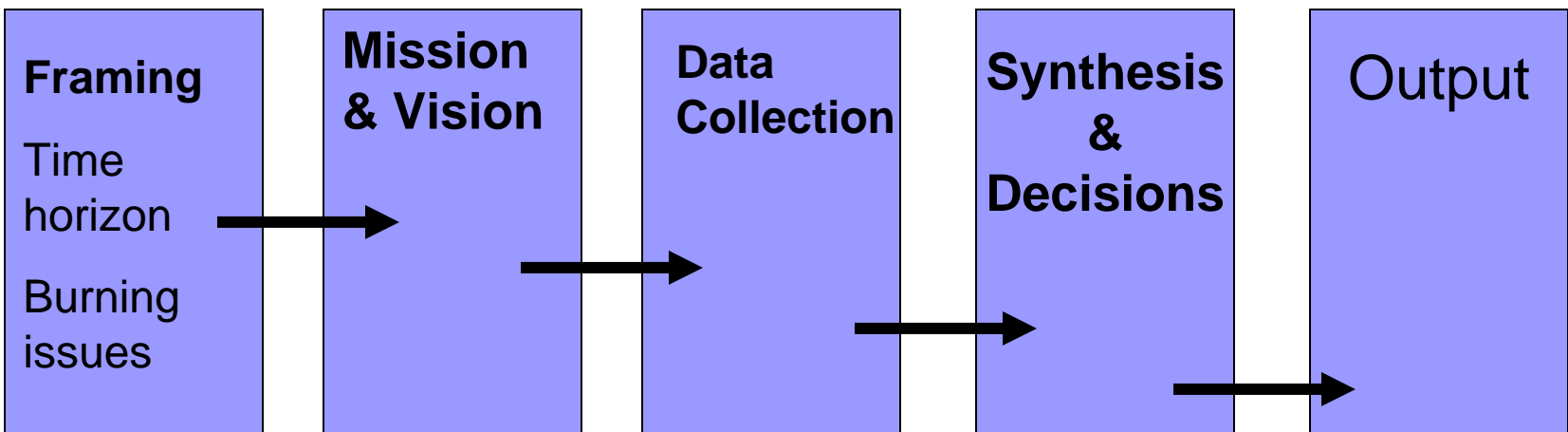
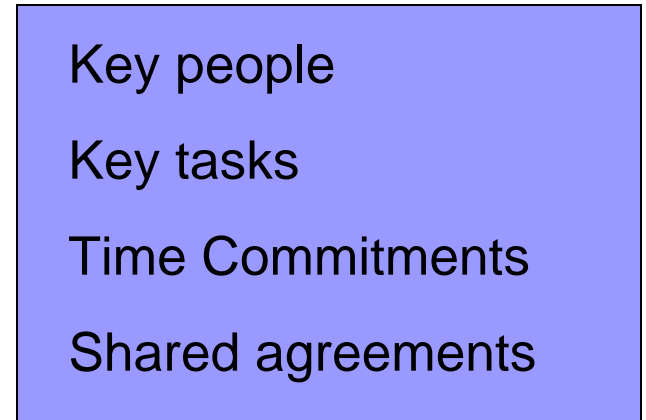
# Strategic Planning



## Initial Planning



## Roles

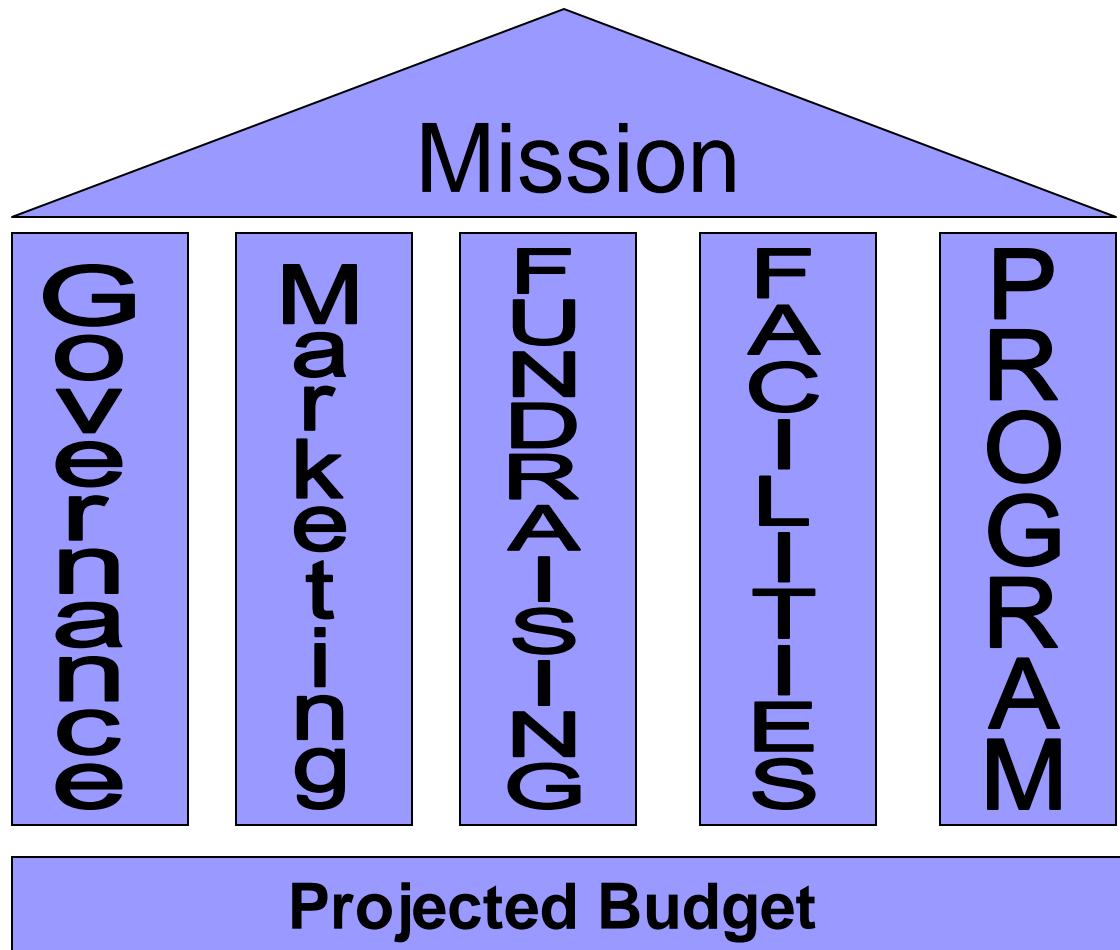


# What's in a Strategic Plan?

# Camp Ramah in the Berkshire's 7 Strategic Goals



# Camp B'nai B'rith Strategic Goals



# Strategic Plan Outline for Goals/Critical Issues

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

S = Specific

M = Measurable

A = Attainable

R = Relevant

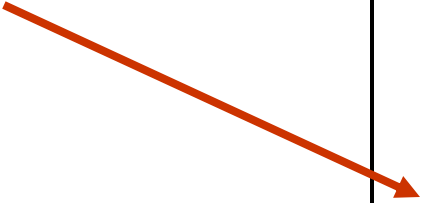
T = Time-bound

Strategic Goal Area

Goal Statement:

Current Status:

Opportunity Statement:



Action Item	Time	\$	Who

# 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?

