

Subordinate Officers Training

Virginia Masonic University

Grand Lodge Committee on Education

Strategic Planning

What is Strategic Planning?

Strategic planning for Lodge purposes, can be defined as is setting **goals, objectives and priorities**, where resources (human, money, technical) are to be spent over the next few years (three to five).

Why do a Lodge Strategic Plan?

- 1) To set direction and priorities:
- 2) To get everyone on the same page
- 3) To drive alignment
- 4) To communicate the message

Strategic Planning help focus on doing the right things, not on doing things right.

What kind of a Strategic Plan should our Lodge have?

- 1) Conventional
- 2) Issues-Based
- 3) Organic and Real-Time
- 4) Alignment Model
- 5) Inspirational Model

What do we do to start this Strategic Plan?

- **Convene a planning group in your Lodge**
- **Go over what is in a plan**
- **Put someone in charge to facilitate**

What are the steps in strategic planning ?

- 1) Analysis and assessment
- 2) Strategy goal formulation
- 3) Objectives for each goal
- 4) Action plans and schedules
- 5) Evaluation of success—
monitoring/updates

What are Goals and how do we set them?

Goals are the ends toward which a program or problem solution is directed.

Example--The Grand Lodge Strategic Plan

Goal #1. Strengthen our Masonic cultural norm that behavior is always to be based on Masonic values and standards.

Goal #4. Develop a community outreach program to improve public understanding and appreciation of Masonic values and contributions.

What should we consider in arriving at our goals?

- What will the world around us look like
- What will be the important trends affecting our Lodge?
- What are our members saying about our fraternity
- What are other people and communities saying about us and why are they saying it?
- How are we doing (member, finances, attitudes)?

What are Objectives and how do we set them?

There are three basic types of objectives

- 1) *Behavioral objectives.*
- 2) *Outcome objectives*
- 3) *Process objectives*

What are Objectives and how do we set them?

How to set Objectives

- 1) Collect baseline data on the issues to be addressed
- 2) Decide what is realistic for your organization to accomplish
- 3) Review the objectives your lodge has created

The best objectives have several characteristics in common. They are all **S.M.A.R.T.**

- They are *specific*
- They are *measurable*
- They are *achievable*
- They are *relevant*
- They are *timed*

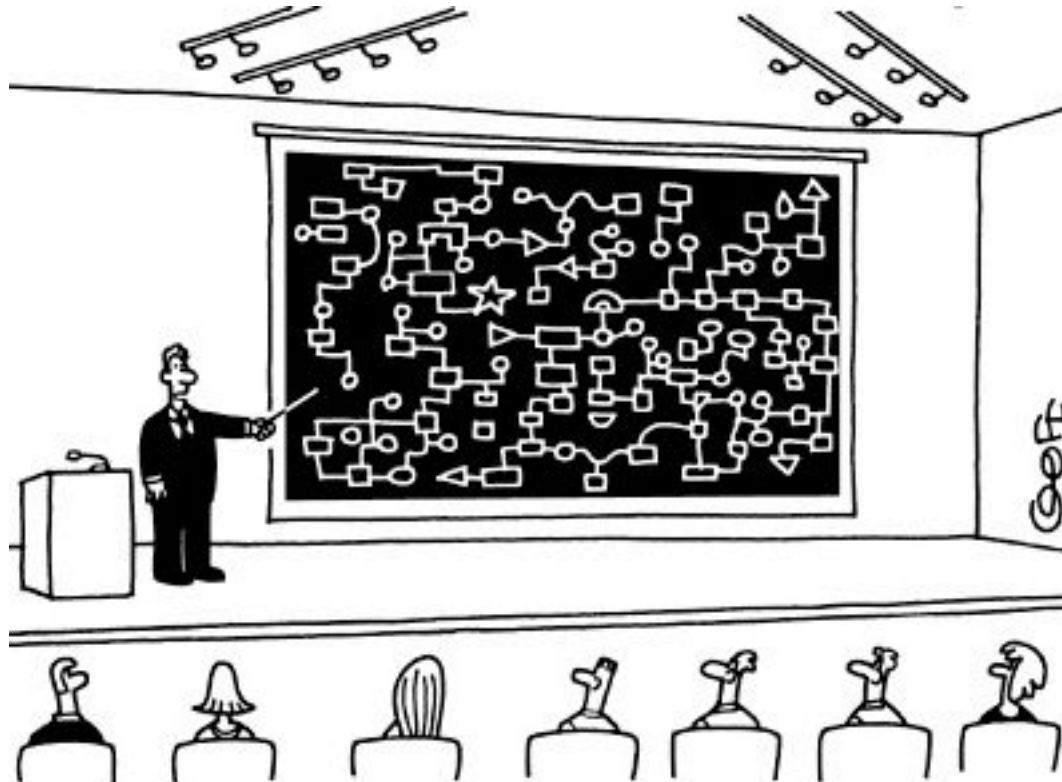
They may also be *challenging*

Example--The Grand Lodge Strategic Plan

Goal #1. Strengthen our Masonic cultural norm that behavior is always to be based on Masonic values and standards.

- 1) Teach the expected Masonic standards of behavior.
- 2) Establish a program of exemplary behavior through mentors and role models.
- 3) Establish a means to measure and improve results and to reinforce exemplary behavior.

What is an Action Plan and how is it developed?



"This is our plan for the next 1,000 years."

USE YOUR OBJECTIVES TO DEFINE YOUR ORGANIZATION'S ACTIONS

An action plan describes the way your Lodge will meet its objectives through detailed actions, steps, that describe how and when these actions will be taken.

What is in an an Action Plan?

- **What** actions or changes will occur
- **Who** will carry out these changes
- **By when** they will take place
- **What resources** (i.e., money, people) are needed to carry out these actions
- **Communication** (who should know what?)

What characterizes a “good” Action Plan?

- 1) *Complete* -- Does it list all the action
- 2) *Clear* - understood and not vague
- 3) *Current* -- reflect the current situation

Example--The Grand Lodge Strategic Plan

Goal	Action Item	Other Committees	Priority	when
	Education Committee			14 actions
1.1	Packet/booklet for new members	Membership	H	Draft 5/30/17 Final 7/30/17 Distribute 11/17
2.2 5.3	Finalize SLOT Training modules (Modules of strategic planning, leadership, Lodge operations, budgets and finances, meeting management—Masonic Univ.) Develop electronic SLOT Report Template and reporting requirements.	Lodge Services & Education,	H	Draft 5/30/17 Final 7/30/17 Distribute 9/8/17
2.2	Update the Education Manual for use by Subordinate Lodges.	Discuss coordination when Draft of the SLOT material is in its final stages	H	Final 10/17 Distribute 11/11/17
5.3	Develop update to District Education Officers roles and responsibilities.	Lodge Services	H	Draft 6/30/17 - Final 7/30/17 - Distribute 9/30/17

How do I keep it going?

- 1) Regular contact:
- 2) Periodically Distributing the Draft action plan
- 3) timelines (with due dates) are complete, clear and current
- 4) regular group meetings
- 5) Celebrate the accomplishment

Key Principles for Success

- Goals look into the future – what and where we want to be.
- The process is flexible and continuous.
- Communication is essential and transparent.
- Strategic Planning is accepted by members.
- A written document is essential.
- Keep in simple.

Now lets put you to work