

COUNCIL STRATEGIC PLANNING DEVELOPMENT GUIDE



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BOY SCOUTS OF AMERICA

BSA COUNCIL STRATEGIC PLANNING DEVELOPMENT GUIDE

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PART I: KICKING OFF THE STRATEGIC PLANNING PROCESS

HOW TO USE THIS GUIDE

The *Council Strategic Planning Development Guide* is part one of a two-part series. This guide explains the importance of strategic planning and describes the recommended process for building a plan. The components and tools of a plan are described in detail in the final sections. Links to videos and websites are also provided to give the reader additional reference material.

The guide parallels the BSA's MyCouncilPlan online management system, which was introduced to the BSA in order to bring industry standards and best practices to the council planning process. The guide and MyCouncilPlan system can be used either as a step-by-step instruction manual or as reference material.

When you finish reading this guide, you should have the knowledge necessary to kick off the development of a Council wide strategic plan.

WHAT IS A STRATEGIC PLAN?

Simply put, strategic planning is the process of formalizing a road map that describes how your company executes strategies chosen to achieve the defined outcomes. A plan spells out where an organization is going over the next year or more and how it's going to get there. A strategic plan is a management tool that helps an organization do a better job in growing and improving the business. Communication of the plan focuses the energy, resources, and time of everyone in the organization in the same direction and on the *big picture* rather than simply the day-to-day details of operating the business.

THE BENEFITS OF STRATEGIC PLANNING

Strategic planning causes you to seriously reflect on the core business, its direction, and what needs to be done to achieve its highest potential. The plan documents the outcome of the planning process.

A strategic plan is developed to provide the council with a coordinated and systematic process for overall council direction and for optimizing future potential. A strategic plan:

- Defines the mission and purpose of the council
- Sets the council's direction
- Helps build a council's competitive advantage
- Assesses the gap between where you are (SWOT analysis) and where you want to be (vision)
- Communicates the council's strategy to staff and volunteers
- Prioritizes financial needs, membership, program, and other activities
- Provides focus and direction to move from plan to action

There are several different frameworks to think about and use. Think of the frameworks as different lenses through which to view the strategic planning process. You don't usually look through two or three lenses at once. Normally you use one at a time, and often you may not know that you're using certain frameworks that are embedded in the process. If you're trying to explain to the planning team how pieces of the puzzle fit together, first you must understand the following frameworks of the strategic plan:

Strategy and culture: A council's culture is made up of people, processes, experiences, ideas, and attitudes. The strategy is where the organization is headed, what path it takes, and how it gets there. You can't have strategy

without culture or vice versa. The culture is like a house, and if it's not in order, the best strategy in the world can't take the council anywhere.

Internal and external: Similar to the strategy and culture framework (see above), you have an internal and external framework. You identify the council's strengths and weaknesses, which are internal, through employee surveys, board assessments, and financial statements. Gathering information from the council's customers, competitors, industry, and environment helps you identify opportunities and threats, which are external.

The Balanced Scorecard perspective: The Balanced Scorecard is a framework used to develop goals and objectives in four areas (instead of departments or committees): financial, customers, internal business processes, and people. The financial, internal business processes, and people areas are internal. The customer area is external.

Market focus: Growth comes from focusing on the council's customers and delivering superior value to them consistently year after year. Built into the strategic plan is a market-focus framework because of how critical this is to the council's organizational growth.

Holistic: All areas of the council are included. Don't plan based on committees or initiatives first because this risks limiting the group's thinking. Plan by thinking about the council as a whole entity and then implement on a committee-by-committee basis.

Understandable: Everyone gets it. If anyone, from the top of the organization to the bottom, does not understand the plan or how they fit in, it won't work.

Realistic: You can implement it. Don't overplan. Make sure the council has the resources to support the goals on which it is focusing.

MANAGING STRATEGICALLY MATTERS TO THE LIFE OF THE COUNCIL

Organizations committed to building and executing strategy are equipped with advantages over their competitors, outperform the market, and are less volatile during times of economic uncertainty. Understandably, the task of developing a strategic plan can sometimes be hard to get off the ground as it competes for time against immediate pressing issues.

Need some help convincing the council to make a commitment to the process? This summary shows how strategic planning makes a real, quantifiable difference for companies and their teams. *The benefits derived will change the life of the council, volunteers, and the youth that are served.*

Strengthen performance: 70% of organizations that have a formal execution process outperform their peers. — *Balanced Scorecard Collaborative*

Drive growth and sustainability: Businesses committed to strategic planning show an increase of 12% on the bottom line and 11% on the top line greater above those that don't do strategic planning. This is in addition to "business as usual" growth. — *Strategic Management Study, by M3 Planning*

Expedite and improve decision making: Good decisions improve financial results. Companies that excel in decision making generate average total shareholder returns nearly 6 percentage points higher than those of other companies. — *"Decide & Deliver: 5 Steps to Breakthrough Performance in Your Organization," Bain & Company*

Insulate against external pressure: Downturns are roller coasters for weak firms. During downturns, weaker businesses are the shock absorbers of their industries—their margin swings are often three to five times that of the leader. That gives companies with strong, focused cores the opportunity to invest and gain ground on their

competitors during the downturn and the subsequent recovery. — *“Global Strategy Practice: Profit from the Core: A Return to Growth in Turbulent Times,” Bain & Company*

Provide clear and coherent direction: Managers don't focus on strategy. 90% of managers squander their time in all sorts of ineffective activities. In other words, a mere 10% of managers spend their time in a committed, purposeful, and reflective manner. — *Harvard Business Review (HBR published a piece many years ago attributing a 10% growth in small business to awareness gained from simply having completed the critical thinking steps of strategic planning.)*

Improve individual productivity: 90% of managers are typically either distracted or disengaged from key organizational objectives. Confusing frenetic motion with constructive action, these managers can be spotted by their unproductive busyness. — *“Closing the Individual Productivity Gap: Putting First Things First,” Franklin Covey*

Manage better, lead stronger: Employees want direction. The most successful managerial behaviors that best correlate with business success include aligning employees with the mission, letting employees know what is expected, tapping into the talents of employees and talking with the employees about their progress/holding accountable.— *“12: The Elements of Great Managing,” The Gallup Organization*

Establish alignment and accountability: Lack of alignment. Only 19% of workers say they can effectively translate the company's top goals into the work they do. — *“The Greatness Challenge,” Franklin Covey*

GUIDELINES FOR EFFECTIVE PLANNING

Following are some guidelines to ensure that the planning is successful.

Do this	Be wary of this
Recruit key dynamic people to be involved in the plan's development and execution.	Don't stifle valuable intuition. The planning committee might include one or more gifted intuitive leaders who could be inhibited by too much procedure or a rushed process. Use the planning process to enable intuitive leaders to share their visions, put constructive wheels on those visions, and bring other people along for the ride.
Make it part of the organization's annual plans. Drive its success by integrating the plan into the council's yearly objectives.	Weigh the costs. Planning consumes time and money. Allocate time and money carefully so the benefits outweigh the costs.
Make it relevant by involving many volunteers to validate.	Don't get lost in the planning process. A good planning process is important, but don't let people become so absorbed with the process that they fail to do good strategic thinking.
Make it complete with all aspects of the program. Update it constantly and use it as a guide in all areas.	Resolve "life-threatening" problems first. A council with a million-dollar debt should probably develop a gutsy debt reduction plan before working on a strategic plan. Fill a Scout executive vacancy before launching a strategic plan and allow him or her to get established before launching a new plan.
Have it approved by the executive board and chartered organization representatives.	Commit to implementation first. Good plans require good implementation. Involve top council leaders and have them commit to developing and implementing a good strategic plan.
Make it available to key Scouting and community leaders.	Plan good group dynamics. If there are smoldering people problems somewhere in the council, strategic planning might cause the problem to surface and defeat the council's efforts. Plan first to resolve the conflict.

PART II: MORE THAN A PLAN, IT'S A PROCESS

The difference between strategic planning and strategic management can be profound to an organization when understood. *Strategic planning* usually refers to the development of a plan. *Strategic management* refers to both strategy development *and* execution. Strategic management is a business process. Strategic planning is an event. Although this guide refers to strategic planning throughout, understand that the reference means developing *and* executing because every Scout executive wants to drive results. And you do that by instilling a business cycle from developing to implementing to adapting and then repeating. <Process Overview Video>

THE FIVE STAGES OF THE COUNCIL STRATEGIC MANAGEMENT PROCESS

The Council Strategic Management (CSM) website explains the process graphically and in detail. These are the five stages for strategic planning.

Stage 1—Initiate a request for strategic planning services. To do this, click the “Contact Us” link and send an email requesting access to CSM. The Scout executive should delegate someone to be the plan administrator for the council. It is critical to assign this task prior to stage 2.

Stage 2—Analyze the council’s current condition. To do this, conduct assessments to define the current strategic position. The Scout executive should launch the Business Report Card tool to solicit feedback from multiple audiences and determine the council’s current standing prior to stage 3.

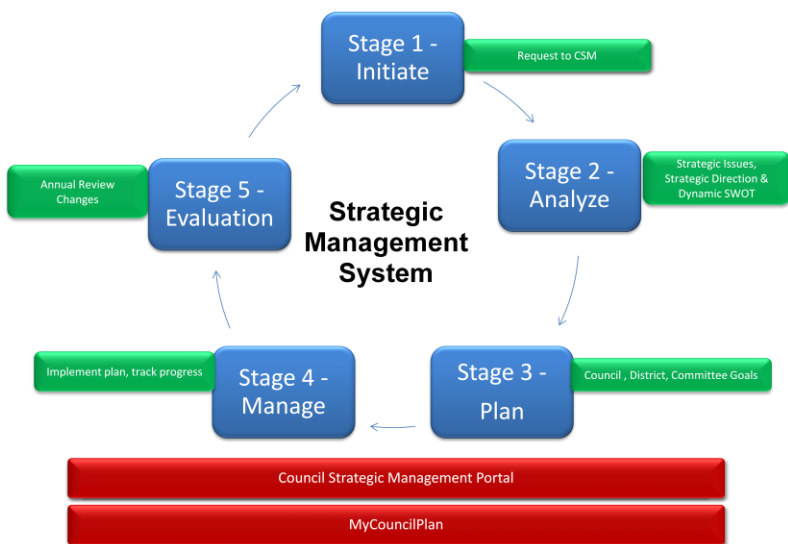
Stage 3—Create the plan. In this key stage, you will define and develop the council’s strategy. Match objectives to the vision, define each goal, and align these with the organization’s resources. In this stage, the council will develop strategies based on actionable items from stage 2.

Stage 4—Manage the plan. You must not only implement and execute the council plan but also keep it current. When circumstances change, you will update the plan to reflect those changes. The council’s plan requires attention and maintenance

to be effective; schedule regular meetings to keep the plan fresh. Incorporate the plan as part of the executive board/committee’s monthly agenda. Don’t discuss the entire plan! The Strategic Plan Chair should bring significant parts of the plan and its execution to the attention of the board. Discuss the HOWGOZIT of the implementation and execution. Let the board know the plan is on track or that a red light needs attention. A short agenda item is all that is necessary to keep the council’s plan alive and working.

Stage 5—Confirm the plan. This stage is unlike the previous stages, as it is not triggered by a previous action; rather, it is date-related and requires these tasks:

- Licenses are required for the MyCouncilPlan (MCP) portion of the site. A council can have as many licenses as it needs to develop the plan. All licenses are free. These are tools specific to business planning and are provided by M3 Planning (the site developer).



- Long-term plan evaluation. Research indicates that you should use the strategic planning and management process for a period of three years to realize its optimal effectiveness. This task is a reminder to assess the plan before heading into the next calendar year so you can make any necessary adjustments and proactively manage the key performance indicators (KPIs).

Stages 1 to 5 can be repeated, and the process is flexible; it is intended as a guideline.

NATIONAL STRATEGIC PLAN ALIGNMENT

The National Strategic Plan contains objectives and goals (pillars) for the National Council and the BSA in general. Each council's success contributes to the success in achieving the national goals, but it's not always easy to see the alignment to a local council in every pillar.

CSM helps to show the alignment to the National Plan by aligning to the Journey to Excellence (JTE). The council focus areas defined in the CSM are aligned to the five JTE objectives. JTE objectives are aligned to the appropriate national pillars. If a council can identify the goals that support JTE, then it becomes clear as to how the council is supporting the National Plan.

FOCUS AREAS

Focus areas are key planning issues to guide a council in providing quality services to youth. Some councils have already met the standards suggested here and will want to raise their sights. Using the framework provided by the National Council, a council should develop or revise a strategic plan that addresses the critical issues of the council.

In October 2010, the National Council introduced Journey to Excellence (JTE), a new program for council recognition based on performance in key focus areas. In an effort to provide continuity and alignment, the CSM focus areas were modified to align to JTE.

[Program](#) covers the products and services (membership, activities, advancement, training, and outdoor program) the council will deliver to the local community.

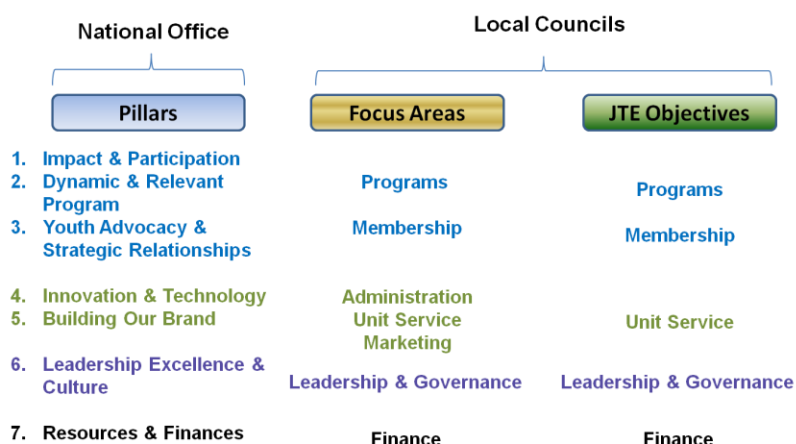
[Membership](#) covers increasing market share of all Scouting programs, as well as increasing youth participation and retention.

[Unit Service](#) addresses keeping proper ratios of youth-serving executives to available youth, commissioner service, and unit visitations.

[Marketing](#) represents the internal and external communications required to effectively articulate the mission and related support to the council (and the community at large).

[Administration](#) refers to the core "back-office" support areas required to ensure that the mission is delivered effectively and efficiently, aligned to the BSA standards, and using the most current industry best practices and technology in office administration.

Alignment to National Plan & JTE



[Finance](#) addresses fiscal management and revenue generation through fundraising and endowment, and represents the gathering of resources necessary for high-impact mission delivery and support, as well as the appropriate management of those resources.

[Leadership and Governance](#) represents the oversight strategies and structure to ensure the high performance needed to carry out the BSA mission. This includes a trained and engaged executive board, direct unit leadership, and the right number of quality unit leaders.

THE COUNCIL STRATEGY MAP AND JTE

Another way CSM shows the relationship to the National Plan is through the Council Strategy Map, which will be covered in more detail in Part IV. The Strategy Map is based upon a Balanced Scorecard format and describes the strategic story of a council. The map encompasses the council's success for delivering value to youth, families, communities, and donors through focus areas. There are four layers to the Strategy Map. The foundation of the map is the values and the mission of the council followed by Talent Management, Fiscal Management, Organizational Management, and finally Programs and Services. Within these groups are the focus areas aligned to JTE. The mapping helps councils focus on the areas required for success and shows the relationship between these areas.

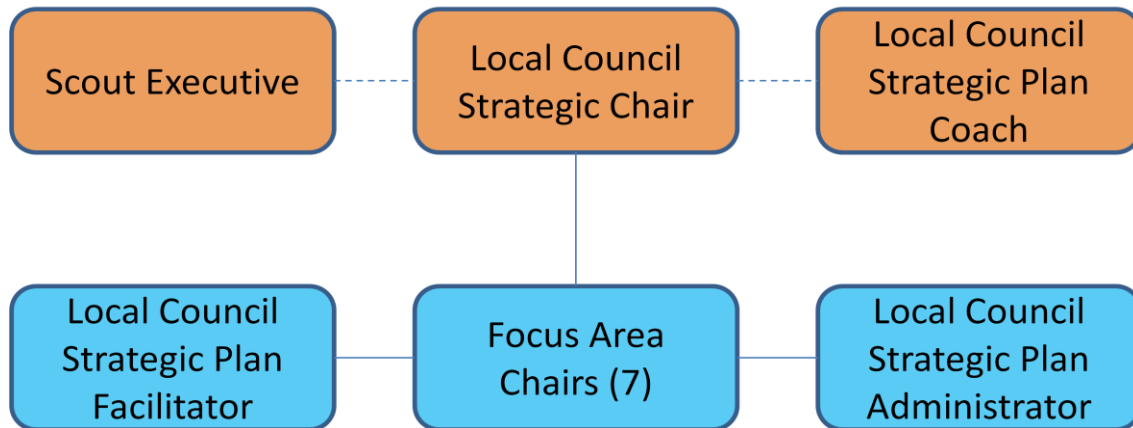


PART III: ESTABLISHING THE COUNCIL PLANNING TEAM

COMMITTEE LEADERSHIP

Propose that the executive board approve the appointment of a strategic planning committee chair and focus area chairs, as well as elicit support for and participation in the planning process. The structure below reflects the team with the Scout executive and plan coach supporting the strategic plan chair. The strategic plan chair is supported by the seven focus areas chairs, plan facilitator, and plan administrator.

COUNCIL STRATEGIC PLANNING TEAM



Scout Executive: Initiates the process on behalf of the council and works with the plan coach to guide the council through the process. The Scout executive serves as plan manager.

Council Strategic Plan Chair: Council's lead volunteer who ensures that the strategic planning process takes place. This volunteer, working with the Scout executive, appoints the focus area chairs and assists in the selection of the council strategic plan Facilitator. The chair presides over all CSM meetings and reports regularly on progress and status to the council executive board.

Council Strategic Plan Coach: Resource who provides coaching, mentoring, and project management support on the delivery and management of a strategic plan using the CSM tools and processes.

Council Strategic Plan Facilitator: Serves as the strategic planning subject-matter expert with skills in running meetings. This person does not have any delivery requirements as related to the execution of the plan, but is solely focused on leading the planning sessions to build the plan. The plan facilitator may be a Scouting volunteer, but may also be a consultant. The role of the plan facilitator is to work with the council through phases 1, 2, and 3 of the CSM process.

Council Focus Area Chairs (7): Provide leadership to board members and key volunteers. Using SWOT analysis (identifying strengths, weaknesses, opportunities, and threats), these chairs are responsible for developing the related goals, objectives, and milestones. They are subject-matter experts in the related focus areas, and they will work with the council Scout executive and council president to define the council's vision and organizationwide strategies.

Council Strategic Plan Administrator: Provides administrative support at meetings, facilitates communication, and manages council licenses for access to the MyCouncilPlan tool. Typically the designee of the Scout executive (volunteer or staff member), the administrator ensures that all required plan data and plan updates are entered into the Web tool on a timely basis, and all reports are distributed as needed. The National Council has a counterpart who will be the first point of contact for the council plan administrator.

VOLUNTEER COMMITTEE

The strategic planning committee should consist of the following:

- Chair
- Coach
- Facilitator
- Administrator
- Program Chair
- Membership Chair
- Unit Service Chair
- Finance Chair
- Marketing Chair
- Administrative Chair
- Leadership and Governance Chair
- Scout Executive

Role of Committee: The role of the committee is to ensure that the strategic planning process is followed in a holistic way with the best interests of the council in mind at all times. Committee members will discuss all committee reports, participate as required, and make suggestions when necessary. They will come to a consensus on all matters and ensure that the plan is properly documented and entered into the MyCouncilPlan system.

Composition of Committees: The committees should be made up of board members who have an interest or expertise in a specific committee. Community experts who are not board members can also make exceptional committee members.

ROLE OF STAFF ADVISERS

There should be a staff adviser to each committee whose purpose is to keep the committee on track and focused on its part of the strategic plan. Ideally, the staff adviser will send meeting notices, take minutes, and conduct most of the back-office research that may be required. Basically, the staff adviser manages the process so that the volunteer committee can gather, digest, and use the best information available to develop the best plan to move the council forward.

PART IV: OVERVIEW OF STRATEGIC PLANNING PROCESS

WHERE IS THE COUNCIL NOW?

Think about where the council is now. Take a look at its foundational elements (mission and value) to make sure there has not been a change. More than likely, a revision in these two areas is not required. Then look at the council's current position or its strategic position, which shows what is happening internally and externally, to determine how to shift and change. Here are some foundational elements:

Mission statement: The mission describes the organization's purpose—the purpose for which it was founded and why it exists. Some mission statements include the business of the organization. Others explain the products or services they provide or the customers they serve.

Values and/or guiding principles: This clarifies what the council stands for and believes in. Values guide the organization in its daily business.

What are the core values and beliefs of the council? What values and beliefs guide daily interactions? What are the council members really committed to?

SWOT: SWOT is an acronym that stands for internal strengths and weaknesses, and external opportunities and threats. These elements are crucial in assessing the council's strategic position. Build on the council's strengths; shore up the weaknesses; capitalize on the opportunities; and recognize and mitigate the threats where possible.

WHERE IS THE COUNCIL GOING?

The elements of the question "Where are we going?" help the council answer other questions, such as, "What will the organization look like in the future?" "Where is the organization headed?" "What is the future the members want to create for the council?" Because the future is hard to predict, council members can have a hard time imagining what the council may look like years from now. The following elements can help members define the future for the council:

Vision statement: The vision is formulating a picture of what the council's future makeup will be and where the organization is headed. What will the council look like five to 10 years from now?

Sustainable competitive advantage: Sustainable competitive advantage explains what the council does best compared to its competitors. Each council strives to create an advantage that continues to be competitive over time. What can the organization be best at? What is its uniqueness? What can the council potentially do better than any other youth-serving organization?

HOW WILL THE COUNCIL GET THERE?

Knowing how the council will reach its vision is the meat of the strategic plan, but it's also the most time consuming. The reason it takes so much time to develop is because there are a number of routes from the current position to a council's vision. Picking the right one determines how quickly or slowly the organization gets to the final destination.

The parts of the plan that lay out the road map are as follows:

Strategic objectives: Strategic objectives are long-term, continuous strategic areas that help the council connect the mission to its vision. Holistic objectives encompass four areas: financial, customer, operational, and people. What are the key activities that the council needs to perform in order to achieve its vision? <Choosing Strategic Objectives Video Here>

Strategy: Strategy establishes a way to match the council’s strengths with market opportunities so that it comes to mind when the customer has a need. Strategy explains *how* the organization travels to its final destination. Does the strategy match the council’s strengths in a way that provides value to customers? Does it build an organizational reputation and recognizable industry position?

Short-term goals/priorities/initiatives: Short-term and mid-term goals convert the council’s long-term strategic objectives into specific performance targets. Goals, priorities, or initiatives can be used interchangeably. Effective goals clearly state what the council wants to accomplish, when the council wants to accomplish it, how the organization is going to do it, and who’s going to be responsible. Each goal should be specific and measurable. What are the one- to three-year goals the council is trying to achieve to reach its vision? What are its specific, measurable, and realistic targets of accomplishment?

Action items: Action items are plans that set specific actions that lead to implementing goals. Include start and end dates and appoint a person to be responsible for that item. Are the action items comprehensive enough to achieve the goals?

Budget: Linking budget requirements to items that cost above the base helps you determine whether your strategic plan makes financial sense. Do the estimated revenue projections exceed your estimated expenses?

HOW WILL THE COUNCIL KNOW IF IT GOT THERE?

Determine how the organization will track and monitor progress. Having clarity throughout the council will allow everyone to know how progress is being achieved and what each member is doing to help move the council forward.

Scorecard: A scorecard measures and manages the strategic plan. What are the key performance indicators needed to track and monitor whether the council is achieving its mission? Pick five to 10 goal-related measures that can be used to track the progress of the plan and plug them into the council’s scorecard.

Execution: In executing the plan, identify issues that surround who manages and monitors the plan and how the plan is communicated and supported. Leadership needs a strong commitment (money, resources, and time) to implement the plan and move the council forward.

TIMETABLE

Phases	Estimated Time Frame
1. Initiate—Sign up and attend training via teleconference.	1 to 2 weeks
2. Analyze—Assess the strategic position (surveys, assessments) and develop purpose and direction (mission, vision, competitive advantage).	2 to 4 weeks
3. Plan—Develop the priorities and strategies (analysis of surveys and assessments, SWOT analysis).	2 to 3 weeks
4. Manage—Develop strategies to operations (council objectives and goals)	4 to 6 weeks
5. Evaluate—Roll out plan and manage.	Review monthly, quarterly, and annually

Time will vary based on meeting frequency and volunteer availability.

Strategic Planning Timetable

	Initiate			Analyze				Plan			Manage			Evaluation		
	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12				
Phase 1	Establish Comm															
Phase 2	Gather Historical Data															
Phase 3	Conduct Surveys	Draft Mission & Vision														
Phase 4			Council Planning Session													
Phase 5				Focus Area Meetings												
Phase 6					Organize data from committees											
Phase 7							Board Approval									
Phase 8							Plan roll-out									
Phase 9								Execution – Regular Strategy Review Meetings								

PART V: ANALYZE THE COUNCIL'S CURRENT SITUATION

REVIEWING WHAT HAPPENED LAST YEAR

- Use JTE to see how the metrics moved in the measurement areas.
- What areas need to improve in the coming year to reach the council's desired medal level? What measure(s) does the organization need to reach?
- In what areas did the council have growth and accomplishment?

SEEING THE BUSINESS THROUGH THE CUSTOMERS' EYES (SURVEYS AND VOS)

- Use the surveys available online at CSM, such as the Business Report Card (BRC), to help survey the council's members.
- Gather information using the new Voice of the Scout (VOS) survey.
- What are customers (stakeholders) saying about the council? What do they really like? What areas do they think can be improved? What things do they see in the environment that might affect the council in the next few years?

STAFF AND BOARD INPUT

Keep the staff and board involved during the entire strategic management process. They need to believe in the direction laid out in the strategic plan because they can make or break the council's success. They are the ones who will be doing the work and pushing the other volunteers to be a successful council.

- Business Report Card survey—Send to staff, board members, and volunteers involved in the operation of the council. The survey will provide a perspective on how the council has done the last year, especially in terms of strategic planning and JTE measurement criteria.
- New Hampshire board survey—The entire board should take this self-assessment to determine where the board members are in their knowledge base in 12 governance categories. The results should then be discussed at a half-day board retreat to develop a plan of action to remedy areas where the board needs improvement.

CONDUCTING A BUSINESS REPORT CARD SURVEY

The purpose of the Business Report Card and, more specifically, the strategy map, is to:

- Provide a basis for understanding the current strategic position of a council plus a snapshot of where it may want to be headed strategically.
- Highlight areas for additional analysis, from both positive and negative perspectives.
- Help direct the work of focus area committees in the council's strategic plan development.

A *strategy map* is based upon a Balanced Scorecard format, as outlined in Part II of this manual; the activities represented are interrelated and support each other. The map describes the strategic story of a council:

- The council's success comes from delivering great value to youth, families, communities, and donors through quality programs and services,
- which is based on managing and enhancing organizational effectiveness through innovative processes;
- supported by a great team with a wonderful place to learn, work, and serve;
- resulting in a fiscally sound council.

This is an "ongoing story" directed by the council's strategic plan as it drives toward its vision based upon a thoroughly understood mission/purpose.

For purposes of providing an example for interpretation, see the map on page 8.

Steps in interpretation:

- Review the subfocus areas and then specific questions of the red focus areas for insight into the root causes of the deficiencies. Also review any gaps between professional and volunteer totals for insight. Reconcile significant differences.
- Validate quantitatively indicated poor performing areas with anecdotal evidence. Perform additional analysis as necessary.
- Review explanations stated in “About the Council’s Score” located in the BRC Report.

For example, Membership is a lagging indicator, both in growth and increase in market share and retention. This situation could result from:

- Inadequate communication of the BSA brand/story to the local marketplace (yellow in Marketing) and fewer youth and/or parents aware of and thus receptive to the BSA program.
- Insufficient numbers of volunteers at the district, as well as existing volunteers not understanding what they need to do to support unit leaders. Thus unit leaders—youth-facing volunteers—will not be able to do their job and youth will not want to stay in the program. With insufficient numbers of volunteers, youth interested in the BSA program will not be appropriately taken care of.
- Finally, the elements of strategic management are lacking (red in Strategy). Without rectifying this essential function, attempts to correct the council’s poor performance will be spotty at best and will most likely fail to deliver growth.

WHAT IS THE BALANCED SCORECARD?

The Balanced Scorecard (BSC) was introduced by Robert Kaplan, a Harvard Business School professor, and David Norton, the founder and president of Balanced Scorecard Collaborative Inc., in the early 1990s as a new way to work with business strategy. Today, more than half of the Fortune 1000 companies in North America are using the Balanced Scorecard, which has become the hallmark of a well-run organization.

To have a balanced and holistic strategy, councils must have goals that feed off each other. These perspectives are described below:

- **Programs and Services:** Delivering great value to youth, families, communities, and donors through quality programs and services.
- **Organizational Management:** Managing and enhancing organizational effectiveness through innovative processes.
- **Fiscal Management:** Running a fiscally sound council.
- **Talent Management:** Support by a great team with a wonderful place to learn, work, and serve.

The only way in which today’s activities will be of value is by making the precepts set forth in the Journey to Excellence a fundamental part of the council’s and district’s day-to-day operations. The organization must use JTE as the new benchmark, and must use the Balanced Scorecard and Strategy Map as the tools to implement change. Progressing to the next level will require action, and taking action will require a shift in priorities.

The old way of determining quality membership retention is obsolete. Judging success on more youth recruited than the year before while ignoring plummeting retention numbers is not only an unsustainable and dangerous practice, but also is not congruent with the Mission and Vision statements of the Boy Scouts of America. Statistically speaking, a minimum of five years of participation in a quality program is the benchmark for Scouting values to not only take hold but permanently shape the life of a child. This change will not come about merely through vigorous recruitment or quick fixes but through a line in the sand. A clear paradigm shift must take place, replacing old methods with innovative ways to deliver the

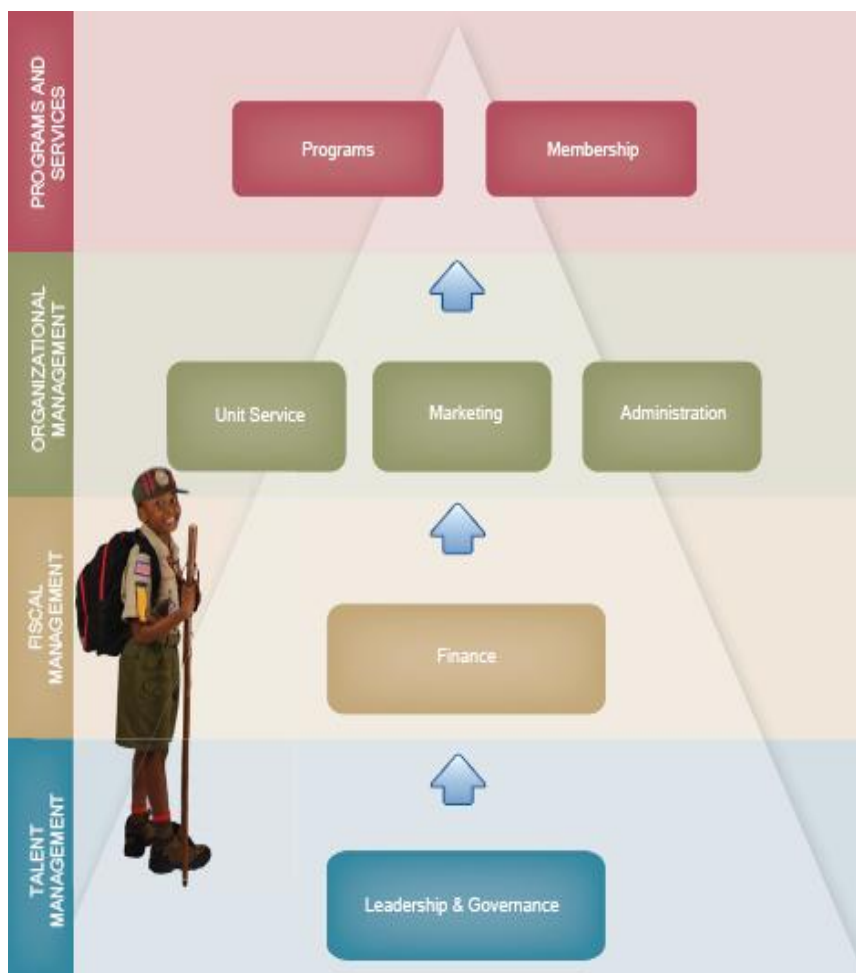
traditional values that the BSA has stood on for 100 years. Through the franchise model, Scouting must become a place of uniformity, but not the uniformity of restrictive rules.

The new model must guarantee quality programs and promise that it doesn't matter what area or background youths come from. To make this possible, councils can no longer feel beholden to the traditional model of money, membership, and manpower. This will require volunteers and staff, from top to bottom, to shift priorities and be willing to forgo short-term tangible results for long-term growth and stability. In this period in Scouting history, more than ever, there is a need to focus on stabilizing units, marketing the BSA brand, and becoming good stewards of the precious funds bestowed by donors. The impact and reach will hit a glass ceiling with current methods; only with innovation and resolve can the BSA change the tide.

WHAT STORY DOES THE STRATEGY MAP TELL?

Really seeing the entire strategic plan—the relationships and dependencies—can be difficult, but it is necessary to make sure the council sees the big picture. Unlike financial plans, with income statements, balance sheets, and cash flow statements, there are no common or uniform elements for describing a company's strategic plan. The creators of the Balanced Scorecard created the idea of a strategy map.

Just like it sounds, a strategy map is a way to evaluate and make visually explicit the council's perspectives, strategic objectives, and goals. With a strategy map, the organization can see the causal relationships between each goal. The



connections that should link Leadership and Unit Service to Programs, Membership, and Finance goals become visible. If there is no connection or there is a hole, the council will not achieve its overall strategy. Strategy maps are not tools for creating strategy; they only describe strategies.

A side benefit of strategy maps is that everyone from the top to the rank-and-file can see how they fit into the overall direction of the council.

The strategy map can also be used to visually depict the council's perspective on its strategic objectives and goals by using the Business Report Card (BRC). The BRC is an online questionnaire available through Council Strategic Management (CSM) on the MyCouncilPlan website, and is categorized into the seven council focus areas aligned to the measurement objectives in JTE.

The data from the BRC is used as the starting point in conducting a council

SWOT analysis, which is covered in Part VII.

PART VI: DISCOVER THE COUNCIL’S CORE PURPOSE AND DESIRED FUTURE

THE BOARD

GETTING THE COUNCIL’S BOARD INVOLVED IN THE PLANNING EFFORT

The council board plays an important part in strategic planning. The degree of influence boards have can vary. But in some form or fashion, appointed or elected members are responsible for defining the organization’s purpose and mission, articulating the strategic priorities for the planning year, and monitoring the execution of the plan. Effective board members should do the following:

- Focus their attention on their policy-making role and stay out of the day-to-day operations
- Establish a clear set of priorities for the organization
- Hold staff accountable for achieving the established priorities through regular meetings and tying budget requests to the strategic plan
- Listen and acknowledge staff recommendations regarding the execution of the plan
- Concentrate their resources on being more effective at policy making
- Participate in the strategic plan development
- Approve the council’s strategic plan
- Oversee the management of the strategic plan

The best way to prepare the board members to perform their roles and accomplish the planning steps in Parts V and VI of this guide is to conduct a board retreat.

THE BOARD RETREAT

After the New Hampshire board self-assessment survey has been completed and the results have been received, the board should schedule a half-day retreat to review the findings and set a course that will better educate the board over time. There is a template available from the Mission Impact team at the national office that will help in setting the agenda and determining the direction of the retreat. The important part is to get board members away from the day-to-day operation so they can concentrate on the results of the self-assessment. At the end of the retreat, a plan of action should have been developed that addresses the governance categories where the board “disagreed” or “did not know.” This plan then needs to be implemented and monitored to ensure the positive development of the board.

ASSESSING THE COUNCIL MISSION

A *mission statement* is a statement of the council's purpose or its fundamental reason for existing. The statement spotlights the business a council is presently in and the customer needs it is presently striving to meet. To build a solid foundation for a successful council, it's essential to have a written, clear, concise, and consistent mission statement. This statement should explain in a simple way who it is and why it exists. Keep it short—Peter Drucker would say the mission statement should fit on a T-shirt.

Examples:

- The American Red Cross prevents and alleviates human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors.
- Arthur Carhart National Wilderness Training Center: Our mission is to preserve the values and benefits of wilderness for present and future generations by connecting agency employees and the public with their wilderness heritage through training, information, and education.

ELEMENTS OF AN EFFECTIVE MISSION STATEMENT

A mission statement serves as a guide for day-to-day operations and as the foundation for future decision making. Make sure that the statement includes the following criteria:

Focuses on satisfying customer needs: Focus the council on satisfying customer needs instead of spotlighting the organization's product or service.

Based on the council's core competencies: Base the mission on a competitively superior internal strength or resource that the council performs well in comparison to its competitors.

Motivates and inspires employee commitment: The mission statement should be motivating. Don't base it on recruiting more youth or making more money but on volunteers' significant work and how the mission contributes to people's lives in the community.

Realistic and clear: Avoid making the mission too narrow or too broad. A mission needs a purpose that's realistic to avoid "mission creep." Many organizations go off on tangents that aren't core to their purpose and are unrealistic because their mission isn't clearly defined.

Specific, short, sharply focused, and memorable: Write a precise statement of purpose that describes the essence of the council in words volunteers and staff can remember.

Clear and easily understood: Develop and write the mission statement so that it quickly and briefly tells people why the council exists. If you keep that concept in mind, the statement can automatically be short and comprehensible.

Says what the council wants to be remembered for: In the end, a mission statement leaves a lasting impression. How do the members want the world to think of the council? The statement can provide simple insight into why it exists.

WRITING A MISSION STATEMENT

Consider answering these questions from the council stakeholders' perspective, and the organization will instantly see an improvement in responses:

- What is the purpose of the council? Why does it exist?
- What activities will the council do to accomplish its purpose? What will it provide?
- What does the council intend to accomplish on behalf of its stakeholders? Or who benefits from the council's work?

A council's purpose and its final mission statement shouldn't be developed by a committee. Use the process above to solicit ideas and input, but ultimately senior leadership sets the strategic foundation for a council. It's really not a democratic process.

Don't get stuck on this part of the process. Many councils adopt the BSA Mission Statement with or without modification. If need be, develop a mission statement or a revised statement that's dubbed a work in progress or a draft. Many organizations get caught up in developing the most perfect statement possible. The mission statement's primary usage is to clearly state the purpose of a council to its staff, volunteers, and other stakeholders. Sometimes it takes years to perfect the statement for public usage. In the meantime, the team members understand why they support the council every day.

For more information, watch M3 Planning's Erica Olsen explain the mission statement:

<http://www.youtube.com/watch?v=XtyCt83JLNY>

FOCUSING ON THE COUNCIL'S NORTH STAR (VISION)

Forming a strategic vision should provide long-term direction, delineate what kind of organization a council is trying to become, and infuse the council with a sense of purposeful action. Vision serves as a unifying focal point for everyone in a council—like the North Star. In fact, the vision statement needs to be something you can achieve at some point in the future. Visions are also referred to as big, hairy, audacious goals, or BHAGs.

The vision should include:

- A short, concise statement of a council's future state
- A long list of words and phrases that vividly describe what that future state is like

Because the items in this list go hand in hand, they can be developed simultaneously.

Here are two examples of visions, or BHAGs, that were very lofty at the time they were established:

- We will put a man on the moon before the end of the decade and bring him back. (President John F. Kennedy)
- A computer on every desk and in every home using great software as an empowering tool. (Microsoft)

Here are some examples of visions from nonprofit organizations:

- Toastmasters International: To empower people to achieve their full potential and realize their dreams. Through our member clubs, people throughout the world can improve their communication and leadership skills, and find the courage to change.
- Private school: To provide a happy, caring, and stimulating environment where children will recognize and achieve their fullest potential, so that they can make their best contribution to society.

Here are examples of visions from some BSA councils:

- Burlington County Council: It is the long-range vision of the Burlington County Council, Boy Scouts of America to remain the largest youth-serving agency in the county.
- Central New Jersey Council: By being visible, relevant, and dynamic, we will be a force for continually improving our communities.
- Cascade Pacific Council: To be the best youth program, as bold as our outdoors, as rich and diverse as our communities.

ELEMENTS OF AN EFFECTIVE VISION STATEMENT

A vision statement needs to incorporate many elements. The following list contains elements that can be included in an effective vision statement (not every one of these needs to be used, but keep them in mind when writing or evaluating your statement):

- **Audacious:** Represents a dream that's beyond what is thought possible. It represents the mountaintop a council is striving to reach. Visioning takes a council beyond their present reality.
- **Capitalizes on core competencies:** Builds on a council's core competencies. It builds on what has already been established: council history, Scout and volunteer base, strengths, and unique capabilities, resources, and assets.
- **Future casting:** Provides a picture of what a council looks like in the future.
- **Inspiring:** Engaging language that inspires. It creates a vivid image in people's heads that provokes emotion and excitement. It creates enthusiasm and poses a challenge.
- **Motivating:** Clarifies the direction in which a council needs to move and keeps everyone pushing forward to reach it.
- **Purpose-driven:** Gives staff and volunteers a larger sense of purpose, so they see themselves as building a cathedral instead of laying stones.

IMAGINE THE COUNCIL'S FUTURE—VIVIDLY

The vivid description in a council's vision needs to be just that: vivid. Include a list of ideas, phrases, adjectives, and so forth that thoroughly explain what it's like to achieve the vision statement. Try to imagine a council when it reaches its vision. A vivid description explains what that feels like. The description should be vibrant and engaging and should translate the vision from words into pictures that people can carry around in their heads.

Here are some helpful questions to consider when developing a vivid description of a vision:

- What does the council look like? How many staff and volunteers do you have? Where are you located? How many districts are in this council? What is the office environment like?
- Who are the staff and volunteers? What are their skills, degrees, and areas of expertise? How does everyone work together? What is the culture like?
- Who are the council's Scouts? How many Scouts do you have?
- What type of projects or programs are you working on? How many programs are you offering?
- What is youth-serving industry, the business community, or media saying about the council? What are the headlines? What publications or TV stations are you featured on? What awards have you won?

To efficiently move through this phase, don't confuse mission and vision. *Mission* is a statement about the council's core purpose—why you exist—and is best stated in the present tense. *Vision* is a statement about the council's desired state—where you want to go—and is best stated in the future tense. Because these two statements are foundational to an effective plan, take the time needed for the council to get them right. However, don't get stuck on wordsmithing and lose momentum in the planning process; rather, focus on intent and allow them to be drafts until everyone is comfortable stamping them final.

See <http://www.youtube.com/watch?v=ioY-YSOKBtY> for more on an organization's vision.

FOCUSING ON WHAT THE COUNCIL DOES BEST (COMPETITIVE ADVANTAGE)

The *competitive advantage* includes assessing what the council does better than anyone else. It's what the organization does that attracts youth, parents, and volunteers to its programs rather than a competitor's. This statement should be no longer than one or two sentences. Keep in mind that the staff and volunteers should be able to effectively explain what the council does within 30 seconds or risk losing a listener. Think of it as the council's DNA—a collection of attributes that makes it unique. The council exists for a very specific reason and has unique abilities, and most likely its purpose is different from any other organization or other BSA council out there. Consider asking staff members for their perspective as well. They may provide some very insightful comments.

Later, when developing the council goals, be sure to include goals that nurture and grow the organization's competitive advantage. Make sure the competitive advantage is something that is long-lasting and not easy to duplicate. Consider the measures below to see if the council is on the right track:

- **Consistent difference:** Youth, parents, and volunteers must see a consistent difference between the council's programs and those of its competitors. This difference needs to be obvious to them, and it must influence their decision to join and/or remain.
- **Difficult to imitate:** The council's competitive advantage must be difficult to imitate. You want to have an advantage that the competition cannot easily duplicate. This might be in the form of people, proprietary knowledge within the organization, or business processes that are behind the scenes.
- **Constantly improve:** Nurture what makes the council different and special. Continuous improvement is critical in maintaining an edge over the competition.

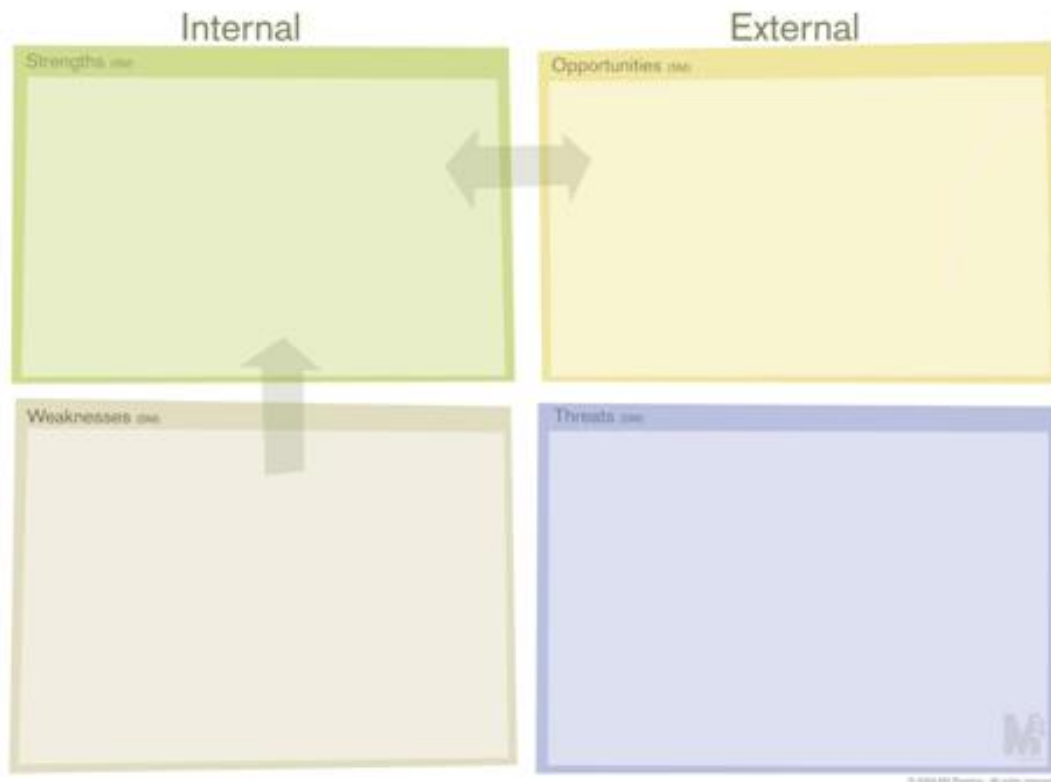
View M3 Planning's video for more information on competitive advantage:

<http://www.youtube.com/watch?v=S9O2oPbT3fs&feature=related>

PART VII: DEVELOP THE COUNCIL’S PRIORITIES AND STRATEGIES

SWOT ANALYSIS

Determine the council’s strategic position by developing a *SWOT analysis* (strengths, weaknesses, opportunities, and threats). To move from where the organization is today to where it wants to go, the council must determine its strategic position by assessing internal attributes and external factors that impact the business environment and progress toward achievement of its vision. A trusted business planning tool called SWOT analysis helps look critically at the organization to produce a good fit between its resources and capabilities and the external environment. However, like any planning tool, a SWOT analysis is only as good as the information it contains. Use the information gathered in Part IV to support this exercise.



SWOT analysis helps provide a better understanding of the strategic alternatives and choices that the council faces. It helps ask, and answer, the following questions: How does the council:

- Build on its strengths?
- Shore up its weaknesses?
- Capitalize on its opportunities?
- Manage its threats?

Once the council completes the SWOT analysis, it should use the information to start developing a strategy that will leverage the organization’s strengths to pursue opportunities while also countering identified weaknesses and threats that might undermine its efforts. Most importantly, match strengths with opportunities, shore up weaknesses, and combat threats as a starting point to form goals.

Evaluate the options generated, and identify the ones that give the greatest benefit and that best achieve the mission and vision of the organization. Add these to the other strategic options that are being considered.

Erica Olsen provides further explanation on SWOT analysis and how it's used in this video:

<http://www.youtube.com/watch?v=GNXYI10Po6A&feature=related>

DEFINE LONG-TERM STRATEGIC OBJECTIVES/PRIORITIES

There are four key areas emphasized by the Balanced Scorecard provided in MyCouncilPlan to guide councils in creating *strategic objectives*. Using the information gathered in the SWOT analysis, develop at least one objective—but no more than five—for each of the following areas (use the Strategy Map in Section V, which shows how these areas align to JTE):

Programs and Services: Delivering great value to youth, families, communities, and donors through quality programs and services.

Organizational Management: Managing and enhancing organizational effectiveness through innovative processes.

Fiscal Management: Running a fiscally sound council.

Talent Management: Support by a great team with a wonderful place to learn, work, and serve.

Keep in mind that the strategic objectives should connect the council's mission and vision. These objectives are *long-term* (think three to five years), continuous strategic areas that get the organization moving from stating the mission to achieving the vision. Ask what key activities are needed to achieve the vision.

Example Strategic Objectives from BSA Councils:

Programs: We will constantly improve our program offerings, and we will manage our program resources wisely.

Leadership: We will lead and operate in ways that model the values of the Scout Oath and Law at all times.

Marketing: We will share the story of Scouting with our members, our funders, and our community. We will make Scouting the organization of choice for young people, chartered partners, volunteers, contributors, and community partners.

Membership: Reverse the current trend of declining membership by improving retention and building our capacity to attract new membership.

Administration: Strengthen information technology and risk management processes while encouraging innovation and adoption of best practices in back-office systems.

Finance: Obtain, manage, and account for the financial resources needed to operate a highly efficient council operation.

Finance: The council is financially secure at all levels due to robust and sustainable funding models that address the current and future needs of all operating, capital, and endowment funds.

SET COUNCILWIDE GOALS AND MEASURES

Once the council has formulated its strategic objectives, translate them into goals and measures that can be clearly communicated to the planning team (team leaders and/or team members). Set goals that convert the strategic objectives into specific performance targets. Effective goals clearly state what, when, how, and who, and they are specifically measurable. They should address what needs to be done in the *short term* (think one to three years) to achieve the strategic objectives.

For maximum effectiveness, each goal must state *how much of what kind of performance* and *by when* it is to be accomplished. This is where it pays off to think *SMART* when creating goals. Remember this simple acronym and populate each field in the “Edit Goal/Action” boxes to guarantee the goals are:

- **Specific:** Goals need to be specific. Try to answer the questions “How much is to be accomplished?” and “What kind of performance is expected?”
- **Measurable:** Goals must be stated in quantifiable terms, or they are only good intentions. Measurable goals facilitate management planning, implementation, and control. For example, a measure might be “# of new customers” or “% complete” and a target might be “500” or “100%,” respectively.
- **Attainable:** While goals must provide a stretch that inspires people to aim higher, they must also be achievable, or they are a setup for failure. Set goals the council can realistically reach.
- **Responsible person:** Goals must be assigned to a person or a department. But just because a person is assigned a goal doesn’t mean that he or she is solely responsible for its achievement; there just needs to be a point person.
- **Time specific:** Goals must include a timeline of when they should be accomplished.

Example BSA Council Goals:

Programs/Membership Goals:

- Serve a meaningful density of available youth by increasing market share to serve 20 percent by 2015. (Programs and Membership) (Measure: Market share served; target: 20 percent)
- Boy Scout Camping: Our camps will be the destination of choice (JTE #10). (Program/Support Service) (Measure: % increase of total Boy/Varsity Scouts attending long-term camp and high adventure; target: 60 percent)

Unit Service/Marketing/Administration:

- Unit Leadership: Create effective volunteer leadership through a systematic approach to recruitment, training, engagement, and accountability (JTE #17). (Membership/District Operations) (Measure: % increase in trained direct contact leaders; target: 35 percent)

Fiscal Management:

- Maintain positive unrestricted net assets in the operating fund to support annual operating expenses (JTE #1). (Administration/Governance) (Measure: % growth in unrestricted net assets; target: 3 percent)
- Endowment: Add new permanently restricted gifts to the endowment fund (JTE #1). (Finance) (Measure: # of gifts added annually; target: 15)

Leadership and Governance:

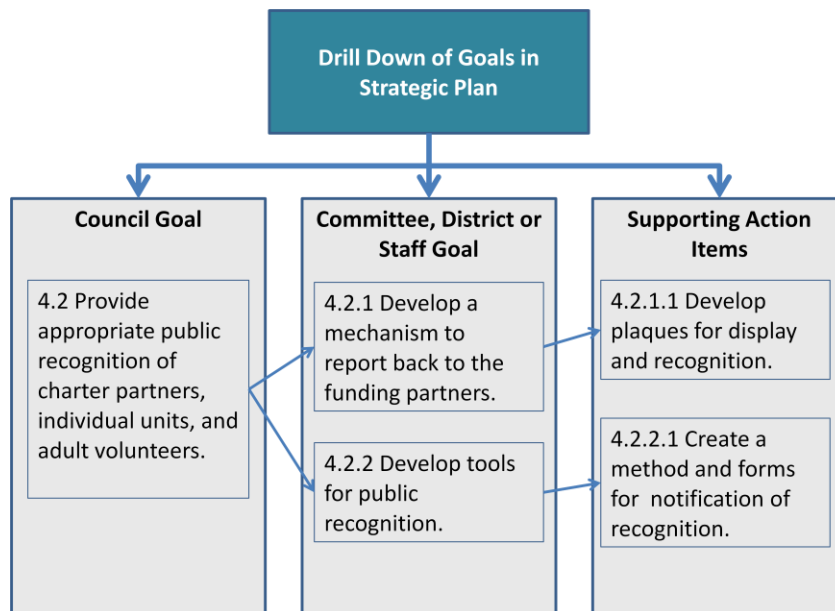
- District Leadership: Grow and strengthen district committees by increasing the number of effective volunteers serving on the district committees (JTE #16). (Membership/District Operations) (Measure: Increased # of volunteers serving on district committees; target: 20)

More on how to write effective goals is available at: <http://www.youtube.com/watch?v=uThBb3kGf4k&feature=related>

PART VIII: CASCADING GOALS TO ANNUAL ACTION PLANS

Cascading action items and to-dos for each short-term goal is where the rubber meets the road. Moving from big ideas to action happens when strategy is translated from the council level to the committee/district level.

This part of the planning process widens the circle of people who are involved in the planning as committee members, staff, and volunteers develop their short-term goals and actions to support the council direction. The council has moved from planning the strategy to planning the operations; from strategic planning to annual planning. That said, the only way strategy gets executed is to align resources and actions from the bottom to the top to drive the council’s vision.



COMMITTEE GOALS

Committees and subcommittees need to create goals to support the councilwide goals. These goals should still be SMART and are generally short term (12 to 18 months).

Finally, committees should develop an action plan for each goal. Keep the acronym SMART in mind again when setting action items, and make sure they include start and end dates and have someone assigned responsibility. These action items support previously established goals and identify all that needs to occur in 90-day increments until the goal is achieved. In the MyCouncilPlan system, all the strategic objectives cascade down to the team member action items. For example, strategic objective 1 cascades down to councilwide goal 1.1, then committee goal 1.1.1, then district/staff/subcommittee goal 1.1.1.1, which is supported finally by the district/staff/subcommittee action item 1.1.1.1.1.

To assist in developing cascading goals, Appendixes A, B, and C are provided for use in planning sessions. These sections can be printed and used in meetings where computer use is not feasible. Appendix A covers council-level objectives and goals, Appendix B covers committee goals, and Appendix C covers district goals.

KEY PERFORMANCE INDICATORS (KPIs)

KPIs are the key performance measures needed for the future success of the council. In his book *Key Performance Indicators, Developing, Implementing, and Using Winning KPIs, 2nd Edition*, David Parmenter identifies seven characteristics that make up a KPI. They:

1. Are nonfinancial measures (e.g., not expressed in dollars)
2. Are measured frequently (e.g., 24/7, daily, weekly)
3. Are acted on by the CEO and senior management team (e.g., the CEO calls relevant staff to inquire what is going on)
4. Clearly indicate what action is required by staff (e.g., staff can clearly understand the measures and know how to fix them)
5. Tie responsibility to a team (e.g., the CEO can call a team leader who can take the necessary action)
6. Have a significant impact
7. Encourage appropriate action (e.g., have been tested to ensure they have a positive impact on performance, whereas measures that are poorly thought through can lead to dysfunctional behavior)

Any goals that meet these characteristics should be flagged as KPIs and tracked using the MyCouncilPlan Balanced Scorecard. The *BSA Council Strategic Planning Execution Guide* has more information on how to manage KPIs.

ASSESS RESOURCE CAPACITY AND SYSTEMS AND ESTABLISH BUDGET

Often overlooked are three key components necessary to support successful implementation: people, budget, and systems. All components must be in place in order to move from creating the plan to activating the plan.

- **People:** The first stage of implementing the plan is to make sure the council has the right people on board. The right people include those folks with competencies and skills that are required to support the plan. In the months following the planning process, expand volunteer and staff skills through training, recruitment, or new hires to include new competencies required by the strategic plan.
- **Budget:** The council needs sufficient funds and enough time to support implementation. Often, true costs are underestimated or not identified. True costs can include a realistic time commitment from volunteers and staff to achieve a goal, a clear identification of expenses associated with a tactic, or unexpected cost overruns by a vendor. Additionally, volunteers and staff must have enough time to implement what may be additional activities they aren't currently performing. A good financial plan will give you a detailed picture of the financial health of the council and the viability of the council's strategic plan. (It can also help the organization identify if it's getting off track during implementation so corrective action can be taken.)
- **Systems:** Both management and technology systems help track the progress of the plan and make it faster to adapt to changes. As part of the system, build milestones into the plan that must be achieved within a specific time frame. The robust execution module of MyCouncilPlan makes this easy by incorporating progress tracking and milestones functionality.

PART IX: LIVING AND BREATHING THE PLAN—EXECUTION, EXECUTION, EXECUTION

COMMUNICATION OF THE PLAN

Good communication unlocks many organizational mysteries, so it's not surprising that communicating the council strategy is critical to success. When the organization continually demonstrates the link between strategy and specific council decisions, volunteers and staff members are encouraged to think strategically as well. After the initial goal-setting process is complete, devise a plan for communicating those goals using the following guidelines:

- **Executive board approval—Make sure everyone buys in:** Don't wait until the plan is close to completion to start talking about it. Get feedback and buy-in from board members, volunteers, and staff early on and after the rollout as well. By gathering and responding to feedback, the council facilitates buy-in and builds a broader understanding of the goals and objectives. Sharing the strategic plan with other stakeholders like investors, community members, vendors, and so on can be an additional step. An open approach can generate more helpful ideas and suggestions about the future of the council. Finally, formally adopt the plan with an executive board vote.
- **Roll out the plan to everyone in the council:** The formal rollout of the plan can range anywhere from a big, high-profile campaign to a low-key announcement as long as everyone is informed. Some stakeholders may get complete copies of the plan while others receive only the body of the plan without appendixes. Professional reports for all of the stakeholders are available in the "View Report" section of MyCouncilPlan along with a description of each to determine their recommended use.
- **Continue to communicate:** Goals must remain visible and repeated to keep the commitment alive; just launching goals with a major rollout isn't enough. See the *Execution Guide* for guidelines on getting started.
- **Culture:** Create an environment that connects volunteers and staff to the council's mission and makes them feel engaged. Develop some creative positive and negative consequences for achieving or not achieving the strategy, and reinforce the importance of focusing on strategy and vision by rewarding success. The rewards may be big or small as long as they lift the strategy above the day-to-day operations so people make it a priority.
- **Structure:** Set the structure of management and appropriate lines of authority and have clear, open lines of communication with the volunteers and staff.

For more information on communicating the council's strategy, watch <http://www.youtube.com/watch?v=9XXmT5Bms6k>.

NOW WHAT?

The next step in the strategic planning process may be the most difficult. *Execution of the plan is where most businesses and nonprofits fail.* This section provides some guidance on how to help a council be the exception and successfully achieve its mission and vision by accomplishing its goals.

HOLDING PEOPLE ACCOUNTABLE

Make sure every council volunteer and professional knows what is in the strategic plan and who is responsible for everything in it. The council board must agree on who will be in charge of the plan as it moves forward. The plan chair, board president, or other designated leader must be clearly identified and will need to take ownership for the council. This person will be responsible for the overall tracking and reporting of the council's progress. He or she will be responsible for ensuring that strategic plan management is part of the council's existing meeting structure.

Next, the council and district committees or focus area chairs must be assigned to manage the council and lower level goals. It is recommended that these individuals have access to the MCP system and be able to update their own goals. This helps with accountability and efficiency.

USING THE COUNCIL'S PLAN IN BOARD AND COMMITTEE MEETINGS

The strategic plan can be integrated into a council's existing meeting structure. Include the plan as an agenda item for every meeting to discuss and focus on key parts. The cascading approach to setting goals aligns itself well to a council's organizational structure. Goals can be filtered for a committee, district, or individual, or the entire plan can be seen in one complete report.

Communication is enhanced by having the ability to email the current reports at any time to members. This is especially beneficial in councils that cover large geographic areas where frequent face-to-face meetings are not practical.

See the *Execution Guide* for more information on managing the plan within the council's existing meeting structure.

PART X: STRATEGIC MANAGEMENT TOOLS

MYCOUNCILPLAN

MyCouncilPlan is an online strategic management system provided by M3 Planning. The system provides councils a way to effectively manage their plans and make them a part of the council’s day-to-day operation. The method used by the new CSM model is detailed in the chart below.

Processes	Tools	Support
<p>CSM uses a five-stage process. The stages are:</p> <p>Initiate Analyze Plan Manage Evaluation</p> <p>Each stage includes an interactive process map that gives a clear path to milestones. A description of the stage’s purpose, as well as intended outcomes and recommended tools to accomplish that stage, are also included.</p>	<p>There are two pieces to this system. The first is the BSA part, which gets you started with strategic management and offers some BSA-specific tools. The BSA tools are organized by the seven focus areas (Governance, Finance, Programs and Services, Marketing, Unit Service, Membership, and Administrative Services). All users have free access to BSA tools.</p> <p>The second part is the MyCouncilPlan (MCP) tools provided by M3 Planning (the site developer) and related to business planning. These tools require licensing.</p>	<p>Every page on the CSM site provides information specific to that page. A link to frequently asked questions (FAQs) appears at the bottom of every page. The licensed portion of the site has more self-help tools, including videos, examples, and suggestions based on industry best practices.</p> <p>Finally, a “Contact Us” link at the top of the page sends an email to the Mission Impact team, which can provide additional support.</p>

ACCESS

Volunteers: For volunteers to gain access to the software, they must have a MyScouting account. To gain this access, simply log in to www.MyScouting.org, and sign up.

When a MyScouting account has been established, the volunteer will need to contact the Scout executive and provide: (1) his or her name, (2) user name, and (3) email address. The Scout executive will contact the national office to place an order for the volunteer’s access.

Contact will be made with the volunteer, via email, asking him or her to complete the following steps to get a license:

1. Click the *Council Strategic Management* tab.
2. Click the *Training* tab at the top; this will take you to the home page.
3. On the home page (at the top right), you will see a box that says *Sign Up*.
4. Click the red arrow.
5. Fill out the boxes, and click Submit.
6. You will be notified by email when you have been given a license.

Professionals: For employees to gain access to the software, they will need a license. The steps are as follows:

1. Log on to MyBSA.
2. Click the *Resources* tab.
3. In the middle of the screen you will see a blue box. Select *Council Strategic Management*.
4. Click the *Training* button.
5. You are now at the CSM site.
6. On the home page (at the top right), you will see a box that says *Sign Up*.
7. Click the **red** arrow.
8. Fill out the boxes, and click Submit.
9. You will be notified by email when you have been given a license.

JTE DASHBOARD

The JTE Dashboard is a council's guide to measure performance against the nationally established benchmarks as well as comparisons with the prior year. As discussed in previous sections of this manual, CSM is aligned to JTE through the BRC survey and the physical layout of the strategic plan in the MyCouncilPlan online system. A council's strategic plan aligned to JTE can be a powerful direction-setting tool for achieving Gold status.

APPENDIX A: BOARD GOAL DEVELOPMENT WORKSHEETS

Board Goals

GOAL ALIGNMENT	BOARD GOALS	WHO	MEASURE	TARGET	START	END

Committee Actions

GOAL: <input type="text"/>		MEASURE: <input type="text"/>		TARGET: <input type="text"/>	
SUPPORTING ACTION ITEMS	WHO?	MEASURE	TARGET	START	END
ROADBLOCKS TO ACHIEVING THIS ACTION PLAN:			KEY SUCCESS FACTORS:		

APPENDIX B: COMMITTEE GOAL DEVELOPMENT WORKSHEETS

Committee Goals

GOAL ALIGNMENT	COMMITTEE GOALS	WHO	MEASURE	TARGET	START	END

Sub-committee Actions

GOAL: <input type="text"/>		MEASURE: <input type="text"/>		TARGET: <input type="text"/>	
SUPPORTING ACTION ITEMS	WHO?	MEASURE	TARGET	START	END
ROADBLOCKS TO ACHIEVING THIS ACTION PLAN:			KEY SUCCESS FACTORS:		

APPENDIX C: DISTRICT GOAL DEVELOPMENT WORKSHEETS

District Goals

GOAL ALIGNMENT	DISTRICT GOALS	WHO	MEASURE	TARGET	START	END

District Actions

GOAL: <input type="text"/>	MEASURE: <input type="text"/>	TARGET: <input type="text"/>			
SUPPORTING ACTION ITEMS	WHO?	MEASURE	TARGET	START	END
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

ROADBLOCKS TO ACHIEVING THIS ACTION PLAN:	KEY SUCCESS FACTORS:
<input type="text"/>	<input type="text"/>