

Strategic
Planning Process

PARTICIPANT WORKBOOK

A practical step-by-step tool for reflecting
and completing your strategic planning process



SCOUTS[®]
Creating a Better World



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Management
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Dear Participant:

We are so excited that you have made the important decision to engage in a Strategic Planning, Monitoring, and Evaluation process with your National Scout Organization. As WOSM has endeavoured an audacious strategy for scouting, "Vision 2023", its success largely depends on the ability of NSOs to align their strategies in support of the vision.

Designed with the NSO in mind, this workbook provides an experiential opportunity to explore the Strategic Planning, Monitoring, and Evaluation process that WOSM has adopted in a reflective manner. Throughout the workbook, space is provided to brainstorm ideas, record recommendations, and analyse key areas of the organisation.

The Strategic Planning, Monitoring, and Evaluation Toolkit is also available, in conjunction with this workbook, as a resource to provide more in-depth content on each step.

We hope that you find the training, the participant workbook, and other companion resources helpful as you begin your journey to strengthen the capacity of your NSO.

Happy learning!

Yours in Scouting,
The 2017-2020 Strategic Planning, Monitoring, and Evaluation Unit



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"A GOAL
WITHOUT
A PLAN IS
JUST A
WISH."

ANTOINE DE SAINT-
EXUPÉRY

INTRODUCTION

What is Strategic Planning? Quite simply, strategic planning is the process by which an organisation defines and acts upon priorities that are essential to its mission.

There are several reasons why strategic planning is necessary:

- It forms the direction in which the organisation is heading,
- It brings everyone in the organisation on the same page, working towards the same vision and goals,
- It helps prioritise the organisation's work,
- It creates synergy across the organisation (cross-team collaboration),
- It helps "tell the story" – within and outside of the organisation.

The strategic planning process begins with a broad summary of what the organisation does and who it represents (mission statement), through an examination of external and internal issues facing the organisation (stakeholder analysis), to the development of key priorities the organisation wishes to focus on. The process ends with an operational plan detailing a clear set of objectives for the organisation, strategies that the organisation will use to accomplish each objective, and the assigning of responsibilities to members and/or committees and the selection of a plan champion/monitor who will oversee the implementation of the overall plan.

SCOUTING CONTEXT

It is important to ensure your National Scout Organization (NSO)'s strategic plan reflects both the needs of your internal (and external) stakeholders as well as the realities of your NSO and the environment in which it operates. It is also important to align your NSO's strategic plan with that of WOSM (World Organization of the Scout Movement) and your Region's strategic plan. The key parts of WOSM's current strategy for Scouting – 'Vision 2023' – is included on the following page for reference.

WOSM'S MISSION STATEMENT

"The Mission of Scouting is to contribute to the education of young people, through a value system based on the Scout Promise and Law, to help build a better world where people are self-fulfilled as individuals and play a constructive role in society."

WOSM's mission statement, which reaffirms Scouting's role in today's world, provides a common starting point for the implementation of the strategy in NSOs.

WOSM'S VISION STATEMENT

By 2023 Scouting will be the world's leading educational youth movement, enabling 100 million young people to be active citizens creating positive change in their communities and in the world based on shared values.





"LOOK WIDE, BEYOND YOUR IMMEDIATE SURROUNDINGS AND LIMITS, AND YOU SEE THINGS IN THEIR RIGHT PROPORTION. LOOK ABOVE THE LEVEL OF THINGS AROUND YOU AND SEE A HIGHER AIM AND POSSIBILITY TO YOUR WORK."

Lord Robert Baden-Powell

WOSM "VISION 2023" STRATEGIC PRIORITIES

1

Youth Engagement

2

Educational Methods

3

Diversity and Inclusion

4

Social Impact

5

Communications and External Relations

6

Governance



A STEP-BY-STEP GUIDE

- 1 CHOOSING THE RIGHT TIME:** Choosing the right time to begin the process of developing a strategic plan for your organisation.
- 2 ASSEMBLING THE RIGHT TEAM:** Building the team of knowledgeable people to both develop and support the implementation of the new strategic plan.
- 3 REVIEW OF THE MISSION AND VISION:** Reviewing the relevance of your NSO's mission and vision for your organisation for today and the years ahead.
- 4 STRATEGIC ANALYSIS:** Analysing the current situation of the NSO, considering internal capacities, challenges faced, identifying stakeholders and the (future) environment in which it operates.
- 5 STRATEGIC PLAN DEVELOPMENT:** Building on these learnings and developing your NSO's strategic plan. Rolling out a wide-spread consultation process with different stakeholders to ensure ownership of the new strategy and getting feedback on your analysis from step 4. Adopting the strategic plan at your National Assembly.
- 6 STRATEGIC PLAN ALIGNMENT:** Aligning your organisation with the new strategic plan (especially in terms of its organisational structure and human and financial resources). Creating the necessary working groups and support structures for the various strategic priorities.

- 
- 7** **CREATING AN OPERATING PLAN:** Creating an Operational Plan to put the strategic plan into action, actively working towards the organisational vision.
 - 8** **RISK MANAGEMENT ASSESSMENT:** Conducting a Risk management assessment to understand how best to carry out the operational plan.
 - 9** **SELECTING MONITORING INFORMATION:** Collecting the right monitoring information to prepare for the continuing work of assessing performance against the strategic plan.
 - 10** **MONITORING AND EVALUATION:** Carrying out a quality monitoring and evaluation process for following the progress your NSO makes towards achieving the goals set out in your strategic plan and to adapt direction where needed.
 - 11** **REPORTING ON PERFORMANCE:** Setup a reporting process for your National Assembly and sharing with other stakeholders.

STEP 1

CHOOSING THE RIGHT TIME

Choosing the right time to begin this journey is an important factor to be considered. The development of a new strategy for a National Scout Organization can occur for a few different reasons:

- 1 The NSO is close to completing a current strategic plan, and is now looking towards a new one for the upcoming period.
- 2 The NSO has a strategic plan in place, however, it has not been implemented, and does not correspond to the (future) needs of the organisation, therefore a new one is necessary.
- 3 The NSO has never had a strategy, and is looking forward to creating one.
- 4 The leadership of the organisation has changed, and insists on creating a new strategic plan.

“YOU CAN
CREATE
SOMETHING
THAT IS PURE
GENIUS, BUT
YOU HAVE TO
GET YOUR
TIMING
RIGHT.”

LANG LEAV

What are the current circumstances of the NSO?



STEP 2

ASSEMBLING THE RIGHT TEAM

Choosing the right team of people to develop your national strategy is a critical step towards ensuring the success of the process. The team should consist of at least 5-7 people who possess one or more of the key attributes set forth below (team size varies depending on size of NSO):

KEY ATTRIBUTES FOR A WELL-ROUNDED STRATEGIC PLANNING TEAM						
Prospective Team Member	Knowledge of strategic planning, monitoring, and evaluation.	Strong understanding of the organisational needs of your NSO.	Able to compile input from different stakeholders and negotiate priorities.	Strong links with Scouting in all parts of your country/ strong network.	Commitment to developing the strategy and following it through the implementation and monitoring phase.	Represents the diversity of the NSO (regional, gender, age, or any other criteria important for your NSO).
1 Jane Doe	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

STEP

3

STRATEGY
WITHOUT
TACTICS IS
THE
SLOWEST
ROUTE TO
VICTORY.
TACTICS
WITHOUT
STRATEGY IS
THE NOISE
BEFORE
DEFEAT.

SUN TZU

REVIEW OF MISSION & VISION

When developing a strategic plan, it is important for an organisation to first agree on the essentials – the overall purpose everyone in the organisation strives towards achieving, or the MISSION of the organisation.

WHAT A MISSION STATEMENT REPRESENTS

The mission statement provides an overall sense of direction for the NSO by defining its overall purpose. It is how members, non-members, the media and community will identify your organisation.

WHAT A MISSION STATEMENT IS

Quite simply, the mission statement is the NSO, summed up in a sentence. It is a statement of purpose – it defines the focus of the organisation, why it exists and what it is seeking to become. It should not be a laundry list of all you do, but instead should be a concise statement, ideally a simple sentence which is easy to understand and with which your membership can easily identify.

The mission statement is your guidance in developing your strategic and operational plans, and therefore it should stand up to a test against a couple of simple questions:

- Is it relevant to your membership? And can you see it being relevant over a long period of time?
- Is it realistic? Can it provide guidance for developing achievable goals?
- Is it understandable to your membership? Do they support it through their regular activities?

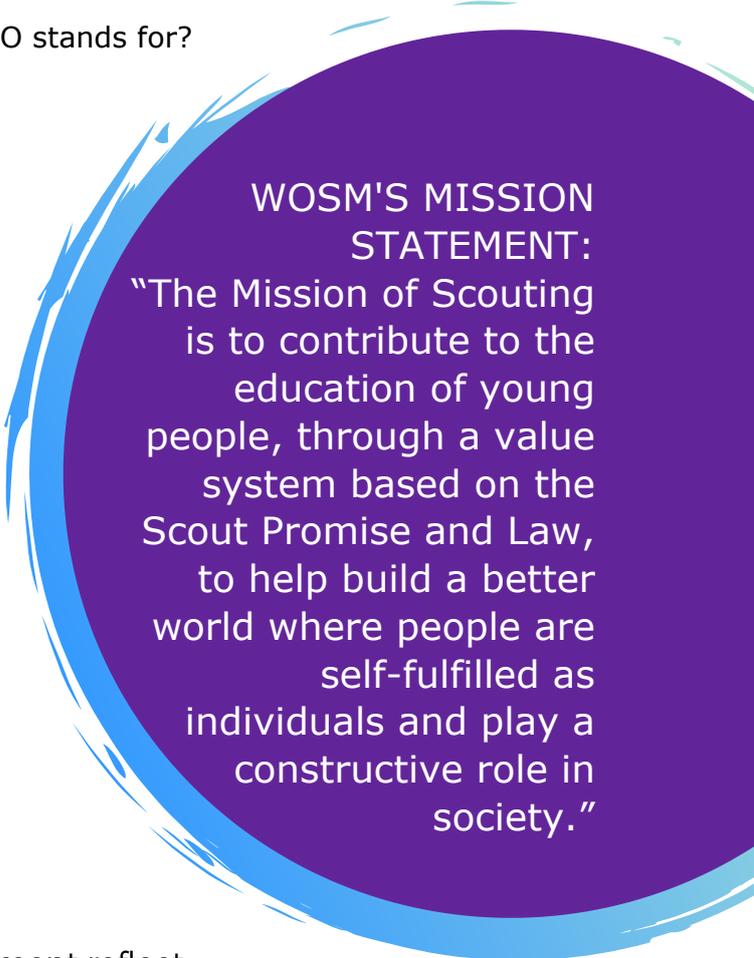
Do you currently have a mission statement? If so, write it below:



DEVELOPING YOUR NSO'S MISSION STATEMENT

A few questions may help with defining (or reviewing) your mission:

- 1 What are the core values your NSO stands for?
- 2 What is your core purpose?
- 3 What do you want to achieve?
- 4 Does your current mission statement reflect WOSM's mission statement (above)?



WOSM'S MISSION STATEMENT:
"The Mission of Scouting is to contribute to the education of young people, through a value system based on the Scout Promise and Law, to help build a better world where people are self-fulfilled as individuals and play a constructive role in society."

SAMPLE MISSION STATEMENTS



BOY SCOUTS OF AMERICA: The mission of the Boy Scouts of America is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Law.



BOY SCOUTS OF THE PHILIPPINES: To help the youth develop values and acquire competencies to become responsible citizens and capable leaders anchored on the Scout Oath and Law.



THE KENYA SCOUTS ASSOCIATION: To educate young people to play a constructive role in Society.

CRAFTING YOUR NEW MISSION STATEMENT

Write your confirmed mission statement for your organisation below:



It is important that you achieve consensus on your mission statement before advancing to the next step.

WHAT A VISION STATEMENT REPRESENTS

A vision statement represents your organisation's dream or ambition—what your NSO would like to achieve or accomplish over a period of time.

While a mission statement captures your organisation's purpose and core values, the vision statement describes the desired future state of your organisation and desired state of your organisation's impact within a given time frame.

WHAT A VISION STATEMENT IS

A vision statement describes the clear and inspirational long-term desired change resulting from an organisation or program's work. A vision usually lasts around 10 years and should span across several strategic plans. When starting your strategic planning process, it is worth reflecting on your current vision and checking if it is still relevant.

Your vision statement should ideally specify that timeframe, as well as outlining a clear and comprehensible goal for that time period, with a measurable outcome.

Do you currently have a vision statement? If so, write it below:

A large, empty rectangular box with a purple border, intended for writing a vision statement. The box has rounded corners and a double-line border.

DEVELOPING YOUR NSO'S VISION STATEMENT

A few questions may help with defining or refining your organization's vision:

1

What needs to be changed? What are the long term issues or problems to be addressed?

2

Why should these issues be addressed?

3

What is your dream-end state? In a perfect world, what would success look like?

4

Does your current vision statement reflect WOSM's vision statement?

WOSM'S VISION STATEMENT:
"By 2023 Scouting will be the world's leading educational youth movement, enabling 100 million young people to be active citizens creating positive change in their communities and in the world based on shared values."

SAMPLE VISION STATEMENTS



SCOUTS NEW ZEALAND: Our vision is that in 2025, more than 25,000 youth will enjoy scouting adventures. They will come from every background with a place for all, shape their own experiences and make a positive difference for New Zealand.



THE BHARAT SCOUTS AND GUIDES: By 2024, The Bharat Scouts & Guides will be a globally visible, consistently growing, self-reliant premium youth movement that is gender balanced, vibrant and responsive to trends. Providing young people with value-based, attractive and challenging youth programme, through competent leaders, effective communication, optimum use of technology and efficient management.



THE KENYA SCOUTS ASSOCIATION: By 2020, Scouting in Kenya will be the leading youth movement, enabling over 4 million young people to achieve their full potentials as responsible citizens and as members of their local, national and international communities through the Scout Method

CRAFTING YOUR NEW VISION STATEMENT

If you need a new vision statement, note it is often easier to write these after you have completed your strategic analysis which is covered in the following chapter.

To come up with your vision statement, first identify the timeframe for your vision (eg. 10 years), and think about what success will look like for your organisation in that time period. Identify a clear goal and measurable outcome you want to achieve in that time. This could be growth related or impact related, either for your members or wider society.

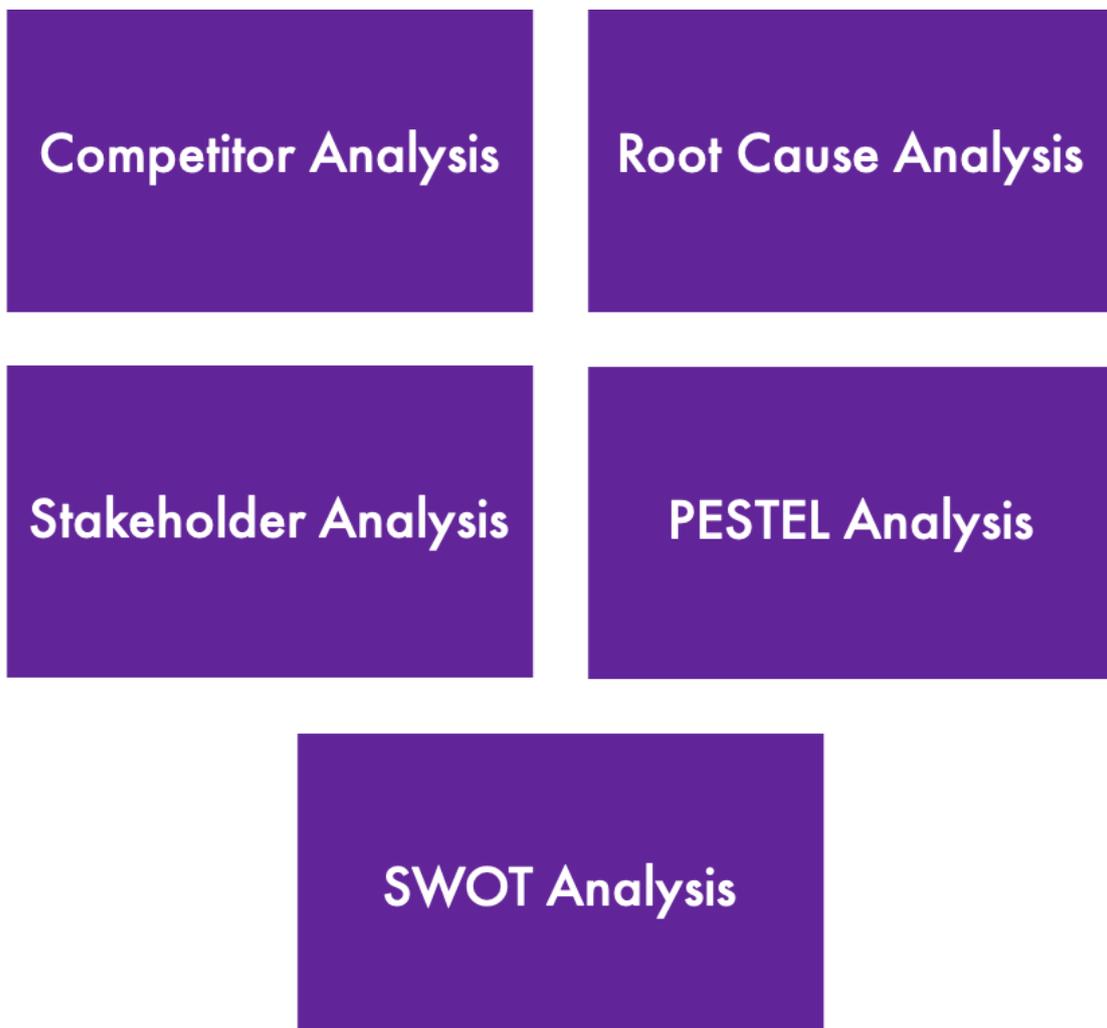
Write your organisation's new vision statement below (you may want to come back to this after the strategic analysis):

STRATEGIC ANALYSIS

WHAT IS STRATEGIC ANALYSIS

Strategic analysis is an approach to facilitating, researching, analysing, and mapping an organisation's abilities to achieve a future envisioned state based on present reality and often with consideration of the organisation's processes, technologies, business development and people's capabilities.

TOOLS USED TO CONDUCT STRATEGIC ANALYSIS



COMPETITOR ANALYSIS

Competitor Analysis is the process of identifying your key competitors and comparing their strengths and weaknesses relative to your organisation.

A few helpful questions to ask when conducting a competitor analysis:

- Who are our competitors? (Note: keep this broad, ie: every organisation (NGO or for-profit) that provides educational or leisure time activities for young people, rather than just other youth movements)
- What threats do they pose?
- What is the profile of our competitors?
- What are the objectives of our competitors?
- What strategies are our competitors pursuing and how successful are these strategies?
- What are the strengths and weaknesses of our competitors?
- How are our competitors likely to respond to any changes to the way we do business?

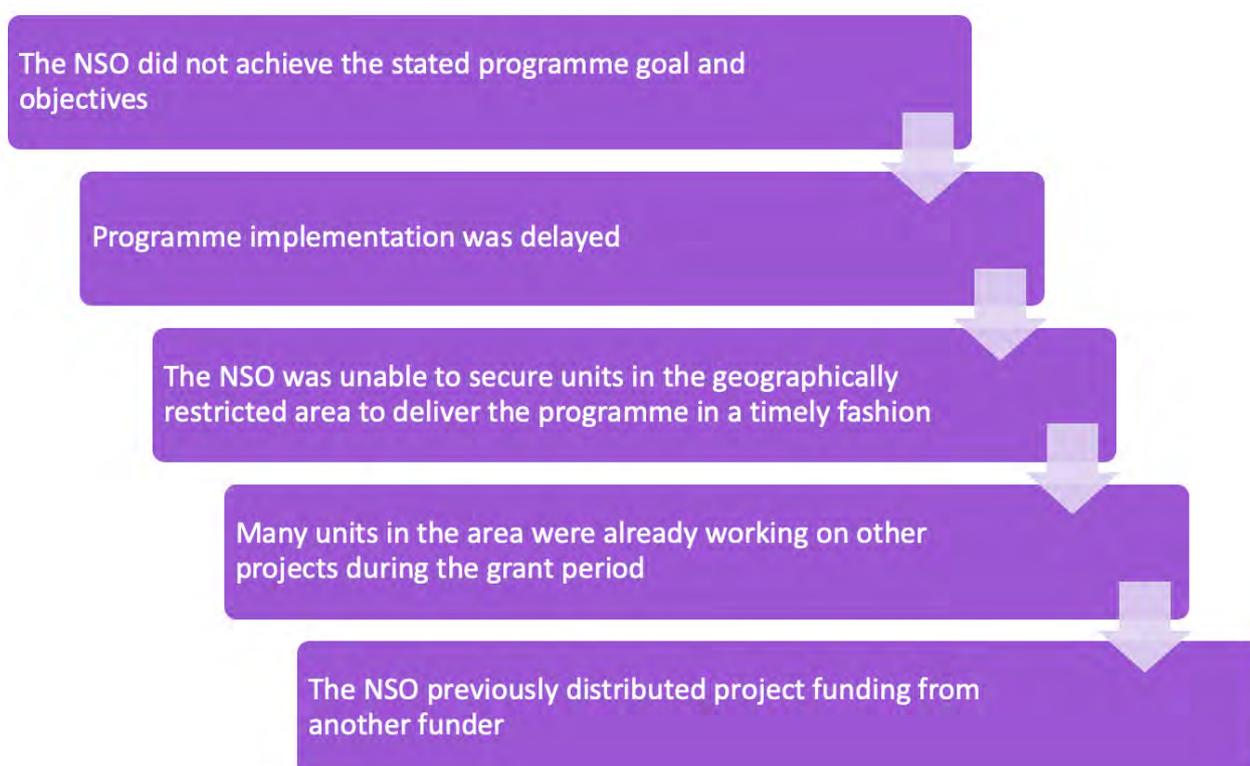
SAMPLE COMPETITOR ANALYSIS MATRIX

SAMPLE CRITERIA	YOUR NSO	COMPETITOR A	COMPETITOR B	COMPETITOR C	COMPETITOR D
Youth Market Share					
Volunteer Market Share					
Revenue					
Program					
Marketing and Communications					
Governance					
Funding Model					

ROOT CAUSE ANALYSIS

Root Cause Analysis (RCA) is a tool that helps to identify the origin of a challenge or problem. RCA seeks to help organisations dissect the different elements of the problem or issue that has occurred, why it has occurred, and identify what measures to take to reduce the occurrence of the problem happening again.

A popular method for conducting root cause analysis is the 5 Why's Method, of which the primary goal is to determine the root cause of a defect or problem by repeating the question "Why?". Each answer forms the basis of the next question.



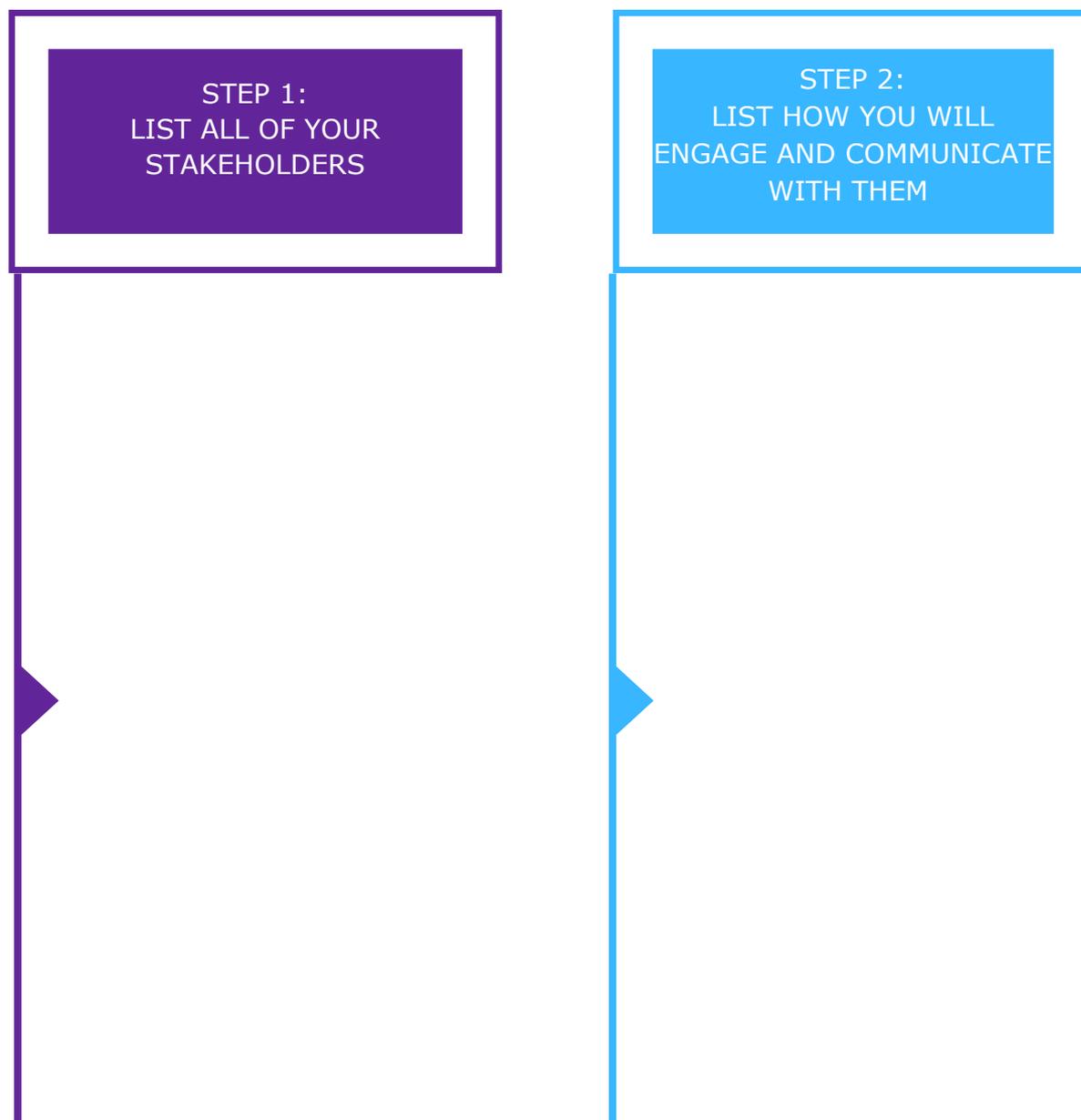
Typical causes of problems include:

- Practical/Material causes – Tangible, material items failed in some way.
- Human causes – People did something wrong, or did not do something that was needed. Human causes typically lead to logistical causes.
- Organisational causes – A system, process, or policy that people use to make decisions, set priorities or do their work is faulty.

STAKEHOLDER ANALYSIS

As part of this analysis process, it is important to identify your NSO's key stakeholders– groups of people, organisations, institutions who have an interest in your organisation, and who can impact the organisation (eg. Youth members, their parents, leaders, governments, partner organisations).

Once you have a list of stakeholders, work out how you will communicate with them in this process, to ensure you get valuable input and also secure an understanding of their expectations of the organisation. Suggested ways of conducting this analysis are surveys or polls, focus group discussions, youth forums, workshops, interviews, or face to face meetings (particularly for external stakeholders).



STEP 3:
IDENTIFY THE PERSON
RESPONSIBLE FOR
CONSULTING WITH EACH
GROUP



PESTEL ANALYSIS

A PESTEL Analysis examines external forces impacting an organisation via Political, Economic, Social, Technological, Environmental and Legal lenses in order to inform strategic decision making.

Below are examples of topical areas to explore when conducting a PESTEL Analysis:

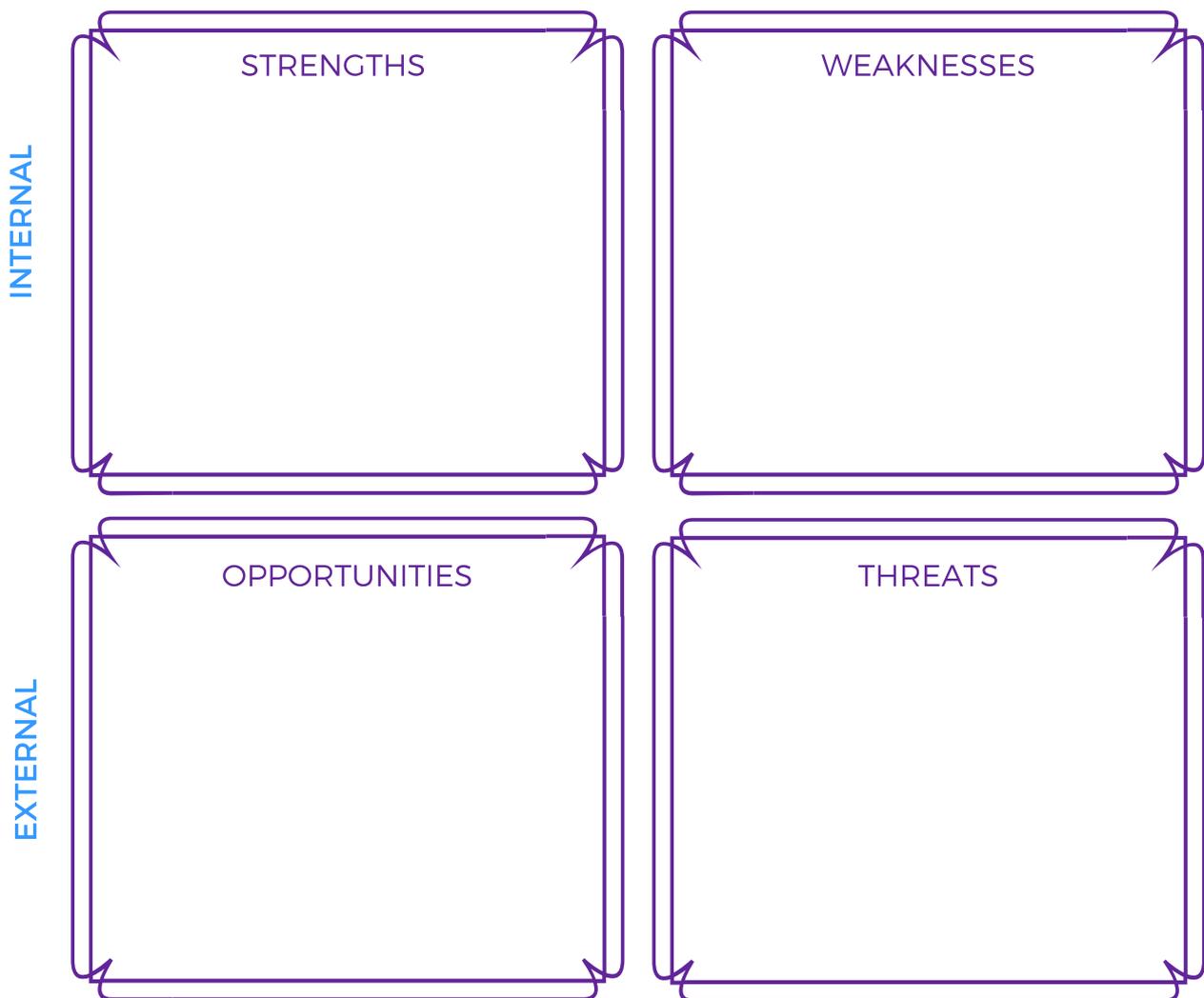
Political Trends	Economic Trends	Social Trends	Technological Trends	Environmental Trends	Legal Trends
<ul style="list-style-type: none"> • Government Stability • War/Conflict • Corruption • Tax Policy/Benefits 	<ul style="list-style-type: none"> • Unemployment Rates • Economic Growth • Disposable Income • Financial Fluency 	<ul style="list-style-type: none"> • Population Growth • Age Distribution • Career Attitudes • Lifestyle Attitudes • Cultural Barriers 	<ul style="list-style-type: none"> • Technological Awareness • Level of Innovation • Automation • Connectivity • Access to Information 	<ul style="list-style-type: none"> • Weather • Climate Change • Environmental Policies • Food and Water Security 	<ul style="list-style-type: none"> • Employment Laws • Discrimination Laws • Health and Safety Laws

Brainstorm external factors that may impact the organization:

POLITICAL	ECONOMIC	SOCIAL
TECHNOLOGICAL	ENVIRONMENTAL	LEGAL

SWOT ANALYSIS

A SWOT Analysis is a strategic planning tool used to help organisations examine all potential factors related to the organisation or a specific business decision, and usually takes place after conducting any number of the previous exercises to help you summarise. Strengths and weaknesses relate to internal factors, whereas opportunities and threats relate to external factors. Your stakeholder analysis will feed largely into the Strengths and Weaknesses boxes, while your PESTEL analysis will feed largely into the Opportunities and Threats boxes.



Once you completed the SWOT analysis, try to identify or assess the likelihood of each element you have listed and its potential impact. Then, undertake a cross-matching exercise – match your Strengths to capitalise on the Opportunities or address the Threats, and cross-match Opportunities to address the Weaknesses.

STEP 5

“YOU
CANNOT BE
EVERYTHING
TO
EVERYONE.
IF YOU
DECIDE TO
GO NORTH,
YOU CANNOT
GO SOUTH
AT THE
SAME TIME.”

JEROEN DE FLANDER

STRATEGIC PLAN DEVELOPMENT

CONSULTATION

Throughout the development of your strategic plan, it is vital to undertake continual consultation with a wide range of your membership and external stakeholders.

Refer back to the Stakeholder Analysis section in Step 4 to determine who might be important stakeholders to consult in the development of your strategic plan.

STRATEGIC PRIORITIES

Once your strategic analysis is complete, identify the key issues facing the organisation and determine 4-6 strategic priorities to reach your organisation’s vision.

To identify what should be your four to six strategic priorities, look at the common themes across your SWOT analysis. These are often defined as critical factors that must be addressed in order to make progress towards your goals.

Some examples might be:

- Governance
- Youth Involvement
- Operations
- Programme
- Volunteer Support
- Communication
- Finance
- Membership Growth (note this could also be identified as the key measure of success of your Strategic Plan)

Review the SWOT analysis from your strategic analysis and through a clustering exercise, identify 4-6 recurring themes that will be your strategic priorities.

Strategic
Priority

1

Notes:

Strategic
Priority

2

Notes:

Strategic
Priority

3

Notes:

Strategic
Priority

4

Notes:

Strategic
Priority

5

Notes:

Strategic
Priority

6

Notes:

OBJECTIVES

Once you've identified your strategic priorities, write an objective for each one. Make sure you agree on your timeframe (either 3-5 years if that's the length of the strategic plan, or say 10 years which is based on the overall strategy). The objectives could be based on what priority/challenge was identified in the SWOT analysis related to that priority.

Objectives state as specifically as possible what the organisation should do in order to address the strategic priority identified. They do not tell how to achieve a result, only what you want to accomplish. They should have the following characteristics:

- Achievable but challenging
- Specific, with a single end result
- Easily understood by a range of people

Each strategic priority will usually have a few objectives, some of which may not be accomplished in one year. A well-written objective has an accomplishment verb. Some examples of these are:

- | | | |
|-------------|------------|------------|
| • Achieve | • Decrease | • Improve |
| • Attain | • End | • Increase |
| • Reach | • Enhance | • Meet |
| • Become/be | • Exceed | • Raise |
| • Begin | • Expand | • Reduce |
| • Build | • Finalise | • Surpass |

Examples of objectives:

1. Increase youth membership by 15%
2. Raise financial reserves to equal fifty percent of operating income
3. Build relationships with local government officials
4. Achieve 90% satisfaction rate in volunteer support survey

Strategic
Priority

1

Objective

A:

Objective

B:

Objective

C:

Strategic
Priority

2

Objective

A:

Objective

B:

Objective

C:

Strategic
Priority

3

Objective

A:

Objective

B:

Objective

C:

Strategic
Priority

4

Objective

A:

Objective

B:

Objective

C:

Strategic
Priority

5

Objective

A:

Objective

B:

Objective

C:

Strategic
Priority

6

Objective

A:

Objective

B:

Objective

C:

STRATEGIC PLAN ALIGNMENT

As a starting step, your NSO now needs to align itself according to the priorities and objectives of the strategic plan. This means that your NSO needs to ensure that all its resources, teams, structures, people (staff and volunteers), projects and activities are working towards achieving the goals set out in the strategy, rather than outside of it. In addition, it means aligning your human resources (volunteer and professional) as well as your budget allocation to your strategic plan.

Using the Start, Stop, Continue exercise can help with this mapping activity of your organisation. If an activity does not fall under any of your strategic priorities, you are faced with two options:

1. Either you deem this activity to be too important to be left out, and you tweak your strategic priorities to include this activity
2. Or you stop doing this activity (as it does not contribute to your overall goal).

START	STOP	CONTINUE

IMPACT ANALYSIS

Another good exercise to do is assess the different level of impact of various activity to achieve a goal or objective, as well as a cost-benefit analysis.

For example, rank on a scale of 1-5 the impact of certain activities you currently do that meet the objectives or strategic priorities you have identified. This will enable you to have a conversation regarding new programmes or events that may have a more significant impact. A cost-benefit analysis will also allow people to understand how many resources are needed and allow them to compare potential actions to achieve the same objective.

COMMUNICATING THE NEW STRATEGIC PLAN

Identify the key messages to communicate to your membership.

1

Explain why we have a new strategy (Why).

2

Explain how the strategy was created and by whom (How).

3

Explain what is in the strategy (What).



Brainstorm what resources you think should be created to help communicate the strategic plan:

Think about how to communicate the plan to your stakeholders and through which communication channel:

STEP 7

“EXECUTION IS THE ABILITY TO MESH STRATEGY WITH REALITY, ALIGN PEOPLE WITH GOALS, AND ACHIEVE THE PROMISED RESULTS.”

LAWRENCE
BOSSIDY

CREATING AN OPERATING PLAN

An operating plan outlines the actions and targets which the organisation will carry out in order to work towards achieving the aims and objectives set out in the strategic plan. It provides the framework for an organisation's day-to-day operations.

A well-written action is more specific than an objective and contains an action verb as opposed to an accomplishment verb. Again, make sure the timeframe is clear within your team – are you working towards a 1, 3, 5 or 10 year timeframe for these objectives and actions?

Focus on a reasonable number of well-written actions for each objective – no more than 8 per objective.

Sample action verbs:

- Change
- Charge
- Consider
- Contact
- Continue
- Create
- Define
- Determine
- Develop
- Encourage
- Establish
- Evaluate
- Explore
- Form
- Foster
- Identify
- Include
- Introduce
- Invite
- Monitor
- Organise
- Provide
- Recognise
- Resume
- Review
- Revive
- Seek
- Train
- Utilise

Examples of Actions:

- Train volunteers to recruit more members locally.
- Review the barriers to joining, and develop actions that make Scouting available to all.
- Identify new communities where Scouting could be introduced.

PRACTICE: OPERATIONAL PLANNING

Choose one strategic priority and one objective and write proposed actions, metrics, timeframes, and persons/committees responsible for completing each action.

Strategic
Priority

1

Objective
A:

Proposed
Action 1:

Proposed
Action 2 :

Proposed
Action 3 :

Timeframe
Action 1 :

Responsible-
Action 1:

Timeframe
Action 2 :

Responsible-
Action 2:

Timeframe
Action 3 :

Responsible-
Action 3:

RISK MANAGEMENT ASSESSMENT

Risk is part of our daily lives—Scouting is no exception. As part of the strategic planning process, it is important to assess risk—the effect of uncertainty on objectives—and identify the potential impact that will result from these uncertainties.

KEY QUESTIONS TO CONSIDER:

- What are the organisation's risks?
- How severe is the impact of each of the risks on the organisation (Scale of 1-4)?
- How likely is it that each of the identified risks will occur (Scale of 1-4)?
- How can you work to mitigate the identified risks?

PRACTICE: RISK ASSESSMENT

Choose one potential risk, rank the risk by impact and likelihood, and identify actions that can be taken to mitigate the risk:

Risk

1

Risk
Impact

+

Risk
Likelihood

=

Risk
Score

Mitigation
Action :

Mitigation
Action :

Mitigation
Action :

SELECTING MONITORING INFORMATION

Developing meaningful measurement tools is critical to making informed strategic decisions. However, there are two primary challenges to measuring progress: (1) identifying what needs to be measured to determine progress and (2) understanding how the indicator will be measured.

PRACTICE: DEVELOPING KEY PERFORMANCE INDICATORS

Key Performance Questions are open-ended, performance-related questions that help you determine what you need to measure to see progress towards your vision.

Develop 1-3 KPQs per strategic priority.

Key Performance Indicators help map progress and enable informed decision making.

KPIs should clearly be linked to a reliable data source and frequency of collection should be determined.

Strategic Priority	Membership Growth
KPQ 1	How well are we reaching out to marginalised communities?
KPI 1	By 2023, our NSO will have increased membership in marginalised communities by 10%.
Data 1	Census data from our local units/annual basis
Responsible Membership Growth Task Force	
KPQ 2	
KPI 2	
Data 2	
Responsible	

STEP 10

"NOT
EVERYTHING
THAT CAN
BE
COUNTED
COUNTS,
AND NOT
EVERYTHING
THAT
COUNTS
CAN BE
COUNTED".

Albert Einstein

MONITORING AND EVALUATION

Measuring progress and achievements is only one part of the puzzle. The real purpose of measuring is to learn about the organisation, its challenges and successes, and to improve and develop even further.

MONITORING

Monitoring aims primarily to provide management and main stakeholders of an ongoing intervention with early indications of progress, or lack thereof, in the achievement of results.

Use of an organisational dashboard can be used as a tool to monitor progress on a regular basis. Using a colour coding system can also be helpful to highlight items that are on-track, slightly behind target, or require immediate action.

EVALUATION

Evaluation is a periodic review at a significant point in the project that measures the success of a project. The evaluation process is reflective and may result in redirection of a strategy.

REPORTING ON PERFORMANCE

WHY APPOINT A PLAN MONITOR/CHAMPION?

Unfortunately, too often organisations spend a great deal of time and energy creating a strategic plan only to shelve it for the next few years. One proven method of getting the most out of your plan is to appoint a plan monitor/champion at the end of the strategic planning process. The plan monitor/champion should be a strategic planning committee member, but ideally should not be the Secretary General or current President/Chair.

DUTIES OF THE PLAN MONITOR/CHAMPION

The job of the plan monitor/champion is simple. He or she reports regularly to the membership and the Board of Directors on the overall progress of putting the strategic plan into action. This involves ensuring that the individual components of the work plan are organised and completed. In order to do this, the monitor/champion works with the volunteer leadership and staff in assigning committees, task forces and members to develop the work plan and determine a timeline for completing each plan strategy. Lastly, the plan monitor/champion communicates periodically with each committee or task force to ensure they are making adequate progress on their work plan.

JOB DESCRIPTION

The plan monitor/champion oversees and reports the implementation and execution of the organisation's strategic plan. The plan monitor /champion ensures that the individual components of the work plan are completed in a timely fashion.

The plan monitor/champion is appointed during the final stages of the strategic planning process. There should only be one appointed plan monitor/champion chosen from the planning group and it should not be the Secretary General or the current President.

The plan monitor/champion reports on the progress of the strategic plan at each board and/or general membership meeting.

LIST YOUR PLAN MONITOR/ PLAN CHAMPION

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FOR THE FUTURE**

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