

American Legion Auxiliary

**Department Strategic
Planning Guide**

~ Simplified !

**How to Develop, Write, and Implement
a Multi-Year Strategic Plan at the
Department Level**

September 20, 2016

Step 1: What is a strategic plan, and why do we need one?

What is a strategic plan?

A strategic plan sets the direction for moving the American Legion Auxiliary (ALA) ahead over multiple years, usually a 5-year period of time. Unlike an annual programs plan or department action plan, a strategic plan sets your priorities over the next 5 years and directs energy and resources to these priorities. Your department strategic plan will help your department better fulfill the ALA mission in a way that is meaningful and rewarding for new and renewing members.

A national Centennial Strategic Plan has been developed and the 5 goals outlined in the national strategic plan have been approved by the National Executive Committee (NEC).

Why does our department need a strategic plan?

As the needs of our veterans and their families continue to grow, our membership continues to decline. The ALA is needed, and yet there is a threat that we won't be around in 30 years if we do not start planning beyond the next installation of officers.

Your annual programs plan and/or your department action plan cover the work that is done at the hands-on, mission-outreach level during a 12-month period (an ALA administrative year). Using the ALA national strategic plan as a guideline, your department's strategic plan will address the bigger issues of growing the membership, being a welcoming organization, developing effective leaders, strengthening departments and units, and increasing awareness of the ALA; these long-range issues take continued, focused efforts over several years.

Key strategic planning terms
<ul style="list-style-type: none">• Goals – broad statements of what an organization hopes to achieve• Strategies – statements that describe how you will achieve your goals• Initiatives – specific projects, programs, and activities that activate strategies so that goals can be achieved.

Step 2: What kind of time and resources do we need to create a strategic plan?

What resources are available to us to create a strategic plan?

This guide is designed to walk you through the steps to create a strategic plan. Your department strategic plan can be simple and brief, while still producing dramatic results in your work to serve veterans and their families.

The national ALA strategic plan forms the basis for your department plan. You do not need to spend a lot of time or money on the strategic planning process – a strategic plan will allow you to work smarter, not harder. To assist you in the planning process, these resources are available to you:

- “Why we need a strategic plan”
- “ALA Organizational Effectiveness Report” - the ALA Assessment Report from members, compiled by Johnson, Grossnickle & Associates
- Online tutorial on strategic planning (under development)
- Initiative Drafting Template
- Work Plan Master Template
- Initiative Tracking sheet with projects

These resources are available electronically at the the Centennial Strategic Plan page on the ALA website in the Members Only area: <https://www.alaforveterans.org/Members/Strategic-Planning/>

In addition, you can call or email the Strategic Plan team at ALA National Headquarters to get your questions answered – (317) 569-4500 or StrategicPlan@ALAforVeterans.org.

What is a realistic strategic planning timeline and budget?

Creating your strategic plan should take approximately three months, though getting input is an important part of department buy-in so your timetable must allow for that. Using the vision, mission, goals, and strategies defined in the national ALA strategic plan will allow you to focus your time on creating tasks that you can do at the department level to implement the national priorities.

As you create your department plan, you may identify additional budgetary requirements outside of your annual budget that are needed to implement your plan. If that is the case, then you will approach your DEC to discuss additional funding for the plan. While the DEC does not approve the strategies of your department’s strategic plan, it does approve the goals and vision (if your department vision statement is modified any from the national vision statement), and it does approve the budgeting of resources that will be needed to implement your department strategic plan.

Note: Your department Strategic Planning Committee or Team can proceed with working on your department’s strategies while waiting for the DEC to approve your department’s strategic plan goals or budget.

Step 3: Who should create the plan?

Your strategic planning process will be led by a Strategic Planning Committee. The Strategic Planning Committee is a special committee, so it is not restricted to the rules in your department governing documents about standing or program committees. A Strategic Planning Committee can have members and non-members serving on the committee and for multiple years as approved by your DEC. Annually appointing all new members to only serve a single year on the committee

is counterproductive to the process of establishing a long-range, multi-year strategic plan.

Note: A strategic planning committee is a great way to get new people involved, so ask all of your members and reach out to non-members, especially those with strategic planning experience.

To begin the work of this committee, your DEC will need to adopt a resolution that affirms your department's commitment to establish and implement a multi-year strategic plan and to charge a Strategic Planning Committee with this task.

The ideal Strategic Planning Committee will be a 5- to 7-member team that serves a 5-year appointment.

Each member can be appointed to a staggered term of several years to avoid turnover of all committee members in one year.

A sample Strategic Planning Committee structure is as follows:



To appoint this committee, the department president will meet with an advisory committee or an executive committee to the DEC to select the members of the Strategic Planning Committee. This advisory committee should consist of the Department President, past president, Vice-President, Department Secretary/Executive Director, and Membership Chair. This group should appoint members to the Strategic Planning Committee who exhibit these characteristics:

- Can think ahead and create a vision for the future
- Can work well with others to make new things happen
- Have time and will commit time to devote to this planning effort over multiple years
- Can be current, past, or future leaders

It is also important that your Strategic Planning Committee consist of the following:

- People with experiences in various areas: membership, finance, programs, etc.
- People of diverse ages, ethnicities, number of years of membership, etc.
- People who are big thinkers as well as people who are implementers

Some helpful “tips” for appointing your Strategic Planning Committee:

When considering the make-up of your department’s Strategic Planning Committee, don’t be restricted in appointing members to serve on your department Strategic Planning Committee should your bylaws state that leaders can only serve in one position or that they may only serve one year. Bylaws address appointed positions to standing committees or annual positions as may be listed in the department’s Constitution & Bylaws and Standing Rules. A Strategic Planning Committee is a special committee. Special committees are “special” because they serve a unique purpose and require distinct talents and expertise needed for that special committee to adequately fulfill its purpose.

In addition to the department president’s appointments to standing committees and recurring department leadership positions, any department president or department governing board (DEC) can establish a special committee. Appointments to special committees are aside from “regular” appointments and are not restricted to the rules in department governing documents that limit the number of standing or designated appointments a person may serve simultaneously.

It may be helpful to think beyond current Auxiliary members to serve on the committee. For example, you may want to add a Legionnaire, a non-member who has experience in strategic planning, or even someone from a neighboring department who has completed the strategic planning process. You can plan the meetings of your Strategic Planning Committee around other meetings to minimize costs and travel.

A person who may be serving on a standing committee, or serving as an officer, or serving in a one-year appointed position that recurs every year (e.g. sergeant-at-arms or distinguished guests chair) may also be appointed to serve simultaneously on a special committee.

When selecting your department strategic planning committee:

- Yes, a department chairman can be confirmed by the DEC to serve on your Strategic Planning Committee
- Yes, an upcoming leader can be confirmed by the DEC to serve on your Strategic Planning Committee
- Yes, a member of your DEC may be confirmed by the DEC to serve on your Strategic Planning Committee
- Yes, a department officer may be confirmed by the DEC to serve on your Strategic Planning Committee

Remember: A Strategic Planning Committee is a special committee and needs to have people serving on it who are dedicated to implementing your strategic plan. Also, it is important these members serve a multi-year appointment to provide for continuity in the execution of your department strategic plan.

Step 4: How do we write a strategic plan?

The department strategic plan will begin with the mission and core values of the national American Legion Auxiliary Centennial Strategic Plan and will include the vision and goals of the national ALA strategic plan.

Note: The ALA mission statement and core values have been adopted at the national level for the entire organization. They are enduring and do not change with every strategic plan. However, you may tailor the vision and goal statements to best fit your department's strategic direction without changing the meaning or deviating from the intent of the national vision and goals.

Vision

By 2019-20, the American Legion Auxiliary's million members will be making a difference for veterans and their families in every neighborhood.

Mission

In the spirit of Service Not Self, the mission of the American Legion Auxiliary is to support The American Legion and honor the sacrifice of those who serve by enhancing the lives of our veterans, military, and their families, both at home and abroad. For God and Country, we advocate for veterans, educate our citizens, mentor our youth, and promote patriotism, good citizenship, peace and security.

Core Values

Our statement of values is predicated on our founding purposes:

- Commitment to the four founding principles: Justice, Freedom, Democracy, Loyalty
- Service to God, our country, its veterans and their families
- Tradition of patriotism and citizenship
- Personal integrity and family values
- Respect for the uniqueness of individual members
- Truthful, open communication in dealing with the public and our members
- Adherence to adopted policies and rules

The department strategic plan will continue by listing the goals of the American Legion Auxiliary national strategic plan as the goals of the department plan.

Goal 5

With The American Legion, Build Brand Loyalty

Goal 4

Strengthen Departments and Units

Goal 3

Develop Leaders at All Levels

Goal 2

Create an Internal Culture of Goodwill

Goal 1

Enhance Membership Strength

Achieving goals 5, 4, 3, and 2 will lead to success in achieving Goal 1.

Your department may use the national strategies or write strategies tailored to your department. There should be about 3 to 6 strategies for each of the goals outlined in the template on the following page.

Then you will create the initiatives which are the steps to achieve the strategies and ultimately the goals of the plan.

Remember, an initiative doesn't have to be new – it can be something that you are already doing in your department that aligns well with the goals and strategies of your plan.

You will also create benchmarks to track your progress as you work toward achieving your initiatives. The following worksheet is what you will use to write your plan. This is your guide!

Step 5: What happens after we write our plan? How do we implement it?

Your department governing board (your Department Executive Committee, i.e., the DEC) needs to vote to adopt the department's vision and strategic plan goals. The National Executive Committee (NEC) has already adopted the mission and 5 goals for the national organization. You can modify these to create your department vision and goals.

Remember: The DEC approves only the vision and and strategic plan goals and not the strategies and initiatives. Why? The vision and the goals last throughout the life of the department strategic plan. The strategies and initiatives can be changed by the Strategic Planning Committee or team as needed, either because they are completed, or because as you work on the strategies, you realize some may need to be modified, combined, or removed in order for a goal to be achieved.

Your strategic plan needs to be an active plan – a document that your department leadership uses monthly to guide the work of your department.

Steps to approve, implement, and monitor your plan:

Step 1: Submit your strategic plan to ALA National Headquarters for review and feedback at StrategicPlan@ALAforVeterans.org

Step 2: Use your strategic plan! Keep the plan in front of you, your DEC, your committees, etc., in order to achieve your strategies.

Step 3: Format your strategic plan onto one page and have that page on your desk and displayed at every department meeting and event. Use the sample one-page template included above. Making the one-page department strategic plan document widely visible and a part of every department meeting reinforces the need for your department leaders and all members to make sure that everything the department does is focused on achieving the strategic plan goals.

Step 4: Appoint goal teams, members from different parts of your state and different ages and backgrounds to work as small teams on each of the 5 goals. Your department goal teams can include members on the Strategic Planning Committee. Just be careful not to overload members in volunteer leadership roles with too many leadership responsibilities. For the ALA to thrive, the strategic plan needs to succeed, so you need enthusiastic members committed to change and making progress on achieving the goals.

Step 5: Annually, submit a report on the progress of your department strategic plan to your Department Executive Committee and to ALA National Headquarters. National Headquarters compiled the department reports to identify trends and mark progress for the ALA's national strategic plan.

Step 6: Apply for the ALA National Achievement Award to earn recognition and money for your Department!.

Step 7: As you near the end of your 5-year plan, you will likely recognize that some new initiatives have arisen through the process, so begin an evaluation process to assess where you are in the fifth year of your plan, then determine how you want to move forward for the next 5 years.

Step 8: Create your new 5-year strategic plan. Making the Auxiliary a likeable, growing, vibrant, recognizable, well-led and well-resourced organization requires thinking ahead, planning ahead, and creating a strategic plan every five years!

You can do it! Here's a quick overview of how to improve your Department's future:

At-A-Glance

Developing and Implementing a Department Strategic Plan

- Recognize the need
- Decide to do something about it
- DEC adopts the vision and strategic goals
- DEC confirms the multi-year appointments to the Dept Strategic Planning Committee
- DEC annually adopts the budget to resource the Dept Strategic Plan
- Strategic Planning Committee assigns teams to work on each goal
- Strategic Planning Committee and/or Goal Teams develop strategies
- Goal team members develop initiatives to achieve the strategies
- Members work on the initiatives
- Dept committees design their program plans to help achieve the strategic goals
- Members report progress to the Goal teams and Strategic Planning Committee
- Committee reports and shouts out progress to Dept members – districts and units
- Goal teams communicate frequently and adjust initiatives as needed
- Strategic Planning Committee modifies strategies as needed along the way
- Continually generate awareness and support for achieving the strategic plan goals
- Celebrate successes!
- Repeat process every five years with a new strategic plan!