



**BOYS & GIRLS CLUBS  
OF AMERICA**

# ***Basic Strategic Planning Guide*** **for Local Clubs**

# BOYS & GIRLS CLUBS OF AMERICA

## STRATEGIC PLANNING GUIDE FOR LOCAL CLUBS

### Contents:

#### **I. Introduction –**

- A. Benefits of Planning

#### **II. Overview**

- A. Readiness for Strategic Planning
- B. Structure and Roles in Strategic Planning
- C. Staging of a Strategic Plan (Time Table)

#### **III. Strategic Planning Model**

##### **Step 1: Review the Club's Mission**

- What is the business of the Club?

##### **Step 2: Develop a Shared Vision Statement**

- What will the Club look like at a specific time in the future?

##### **Step 3: Gather & Assimilate Useful Data**

- Progress Report
- Club or Internal Data
- Community or External Data

##### **Step 4: Develop Strategies for the Future**

- What direction must the Club take to move to a higher level of effectiveness for youth?

##### **Step 5: Secure Board Vote on Strategies**

##### **Step 6: Convert Strategies into Work Plans**

- What results are expected and what will be the cost?

##### **Step 7: Secure Board Vote on Complete Strategic Plan**

##### **Step 8: Implement and Monitor the Plan**

- Making the plan work

#### **IV. Workbook**

- A. Worksheets for each step of the planning process

# INTRODUCTION

A strategic plan is among the most effective communication tools available to a Boys & Girls Club. The involvement of the board of directors, staff, volunteers, appropriate community representatives and funding bodies creates an environment for input and sharing that ultimately leaves all involved more informed. It also provides the Boys & Girls Club with agreement on priorities to be addressed.

Plans are crafted to fit the specific needs of the Club community, are strategic in nature for three-to-five years and are tactical in nature for two years. Strategic plans define the business of the Club at all levels.

## **Benefits of Planning - Why get involved in strategic planning? To:**

- ▲ develop a clearly defined, clearly understood mission, vision and work plan for the organization;
- ▲ tie the local Boys & Girls Club to the spirit of the mission for the Movement and to the major themes of the Boys & Girls Club Movement as defined in “Building the Foundation...The Report of the National Planning Commission;”
- ▲ translate intentions into accomplishments;
- ▲ commit board and staff to specific actions through formal decisions;
- ▲ fill gaps in programs and services leading to improvement of the Club's impact on the community;
- ▲ get beyond or escape the “problem trap;”
- ▲ get **everyone** involved!;
- ▲ integrate issues, problems and all facets of the organization through one comprehensive planning system;
- ▲ monitor operations - and get things done.

## **Boys & Girls Clubs of America**

Field services staff of Boys & Girls Clubs of America stand ready to be of assistance to your Club in the planning process. The service director assigned to your Club works with the chief executive officer (CEO) using a number of assessment tools that are of great value in planning. Their involvement at the earliest stages of planning can be pivotal to its overall success.

This planning guide outlines the steps required to devise a strategic plan for your Boys & Girls Clubs. Those with planning experience may only need to use the workbook. Others will find it helpful to use the Planning model section of the Planning Guide as a reference.

# OVERVIEW TO STRATEGIC PLANNING

One of the first outcomes of planning is a re-focus or re-affirmation of the mission and vision of the Boys & Girls Club. In so doing, the Club explores the values and beliefs that drive the Club. Information is shared and evaluated. The direction of the Club is then set in very specific terms for the immediate future, and in more strategic terms for the long-term future.

Throughout the planning process a clear focus must be maintained on the outcomes of services that benefit youth. The Club is in business to ensure its members are provided the opportunity for positive growth and development. All aspects of a Boys & Girls Club plan must be aimed at this eventual outcome.

## **Two essential principles of the planning process are:**

1. Systematic gathering and clarification of data pertinent to the Club's mission.
2. Involving board, staff, appropriate community and funding representatives and others.

## Readiness for Strategic Planning

Not all Clubs should develop strategic plans. Certain conditions may exist that preclude planning for the time being. An example of such a situation is during a financial crisis. The Club must focus on the crisis and have a solution in hand before it can develop a comprehensive, strategic plan. The Club should be reasonably stable for the planning process to be successful. Among the valued roles of BGCA's field services is the assessment of organizational readiness for strategic planning.

Perhaps the most significant step the Club can take to prepare for planning is the completion of a Self-Evaluation. Data generated by Self-Evaluation will influence the work of the Club during the life of a plan.

## **Optimal Conditions for Planning**

- ▲ Club stability and maturity.
- ▲ External control agents, i.e., major funding bodies or donors, seek or require a plan from the Club.
- ▲ Club is ready to make a step up in quality, size or scope of service.

# Structure for Strategic Planning

The **board of directors** is the authorizing body for all work associated with planning. The sanction and involvement of the board and the **chief volunteer officer** or board chair is critical to the process. ***The ultimate leader of the planning process is the board chair.***

**The chief executive officer**, as directed by the board of directors, plays a central role in strategic planning, receiving recommendations from key community leaders, board and staff leaders while adding his/her own perceptions of issues, problems, and aspirations. The planning committee and the board, supported by the CHIEF EXECUTIVE OFFICER (CEO), make decisions based on the information.

**The board of directors, with the support of the CHIEF EXECUTIVE OFFICER (CEO), does the following:**

- ▲ Commits to being involved. The first total board action is often to participate in a board retreat during which critical decisions are considered.
- ▲ Appoints the strategic planning committee. Usual members include: current board leadership, board members expected/planned to serve in leadership roles within the next two-to-three years, the CHIEF EXECUTIVE OFFICER (CEO) and appropriate experts such as planning officers of board member's companies and significant funding source leaders.
- ▲ Votes to decide on priority strategies for the Club.
- ▲ Votes to decide the final complete plan and its budget.

## **Strategic Planning Committee**

- ▲ Gathers information from both internal and external sources that can assist the planning process.
- ▲ Seeks a board vote on strategies that may determine the direction of the Club for up to five years.
- ▲ Develops the plan.
- ▲ Seeks a board vote on the complete plan and its budget.
- ▲ Fulfills its oversight responsibility by monitoring the plan.
- ▲ Considers factors, which may call for plan modification or extension.
- ▲ Considers emerging strategies.
- ▲ Reports to the board of directors.

## **Summary of Decision-Making Roles**

- ▲ The board appoints the strategic planning committee.
- ▲ The board and CEO agree on the vision, mission and strategies of the Club.
- ▲ Appropriate work teams or groups agree on and develop the work plan and budget for areas of assigned responsibility.
  - ⇒ In situations requiring board assignments, the board is responsible for the design as well as the achievement of work.
  - ⇒ Work defined by/for the CEO and staff is subject to board approval.
- ▲ The board issues final approval of the complete plan.

## Staging a Strategic Plan (Timetable)

The scope of a strategic and strategies can run from one year to three years depending on the development needs of the organization. However, one can only develop a specific plan with detailed implementation steps for one-to-two years, and perhaps general details for a third year. Considerations for each of the three years are as follows:

- ▲ Year One – Short term must, specific actions addressing those issues that can be completed in a 12-month period of time and for which detailed costs can be forecasted. Include any existing or impending crisis, legal requirements not being met, are the start on long-range work that is a part of the strategic plan.
- ▲ Year Two - Actions that address potentially significant problems or crises that may occur over two years if “business as usual” continues. Include action that has an impact on major issues moving the Club toward approved strategies, and for which relatively detailed costs can be defined.
- ▲ Year Three - Actions that impact changes required over a three-year period. These actions should result in accomplishments that significantly impact quality, growth, location of Club(s), etc. It is often difficult to forecast detailed costs for actions to be taken three years in the future. General costs should be defined.

At the conclusion of each year, the Club is to assess its progress and consider changes that are mandated by emerging strategies. Where necessary, it should adjust the work plan and budget as dictated by the experience of the preceding year. The board again reviews significant changes and a vote is taken. An annual board retreat is the most effective way to consider the achievements of the past year and determine if any change in the plan for the future is warranted.

After each year, the Club should revisit the total planning process to define a current set of strategies for the coming year, and a detailed vision/strategy for up to three years.

## Flexibility of the Planning Guide

Often, members of the board of directors have significant planning expertise. There is no single, correct way to plan. In situations involving persons with expertise, the planning guide may serve as a resource to be included in a planning process defined by others. Ultimately, board involvement, critical thinking about the future of the Boys & Girls Club and clarity about the Club’s future, defined by strategies and fulfilled by work of the board and staff, is the required outcome of planning.

# STRATEGIC PLANNING MODEL

## STEP 1: Review Club's Mission

The strategic planning committee reviews the current mission of the Club. The mission should come from the heart of the Club. Involving all staff and board in some level of discussion is ideal but often impossible. Input is essential because it builds ownership. The strategic planning committee either confirms the current mission or suggests a new statement to the board of directors. See the national mission statement at [www.bgca.org](http://www.bgca.org)

## STEP 2: Develop a Shared Vision

The chief professional officer, working with the board chair and the planning committee, plays a critical role in developing a vision for the Boys & Girls Club. A vision is simply a description of what the Club will look like at some specified time in the future. In forming a vision statement considers specific, pointed statements that “drive” the rest of the organization. A vision statement describes the impact the Club has on the community and/or the impact of the Club on youth of the community. Vision statement samples include: (Note: Include a specific timeframe and quantifier(s) in your vision statement.)

- ▲ By (year) the Boys & Girls Club will be serving (average number) of members per day in our clubhouses and will be operating at 100% capacity.
- ▲ By (year) the Boys & Girls Club will be recognized as the most effective youth development program for (number of youth) in the city. Our outcome data and support that we improve the high school graduation in our community by \_\_\_\_%
- ▲ By (year) Our 90% of our board will meet or exceed the Strong Boards Key Performance Indicators. See the Key Performance Indicators for Strong Boards at [www.bgcaboards.org](http://www.bgcaboards.org)
- ▲ The Boys & Girls Club of Any Town, USA will have (number) days of operating capital in reserve by (date)

A vision, well stated and accepted by a Club, becomes the cheer, chant, or mantra of the board, staff, volunteers, and parents.

Discuss the vision with the planning committee and staff. Confirm that the vision is shared and understood by all. Assure that the vision is delivered to the board, along with the strategies that will support the vision.

## STEP 3: Gather & Assimilate Useful Data

First, review Boys & Girls Clubs of America's Fact Book and Data Reports for your region, state, and organization. BGCA can provide a myriad of reports and data on your organization and is available from your regionals service center and or **Director of Organizational Development**. The Great Futures Plan set the direction of the Boys & Girls Club Movement for the next five years.

Priority data should be formatted in an easy to read, understandable manner and discussed in depth by the strategic planning committee. Do not overload the committee with too much data. Only select data of specific value to the Club and its services to youth. Too much information bogs down the planning process and can engender “analysis paralysis.” The following can help the strategic planning committee determine the data most helpful to the process:

### **Three Year Trend Analysis**

Important to development of a strategic plan is the determination of trends and progress made by the organization over recent time. Identify accomplishments that met or exceeded expectations and develop a rationale for efforts that fell short of planned outcomes. Request a copy of your organizations Three Year Trend Analysis. This is a function of staff. It is best if board and staff–prior to starting the planning process–review the reports. What gets measured gets done.

### **Data & Organizational Scorecard**

Specific data of greatest benefit to the planning process is identified by use of the your Boys & Girls Club America Director of Organizational Development can assist you with following data points and reports.

#### **Additional sources of data from BGCA:**

- ▲ Three Trend Analysis
- ▲ Key Performance Indicator Reports and Trends
- ▲ Results of the Formula for Impact Assessment and Scorecard
- ▲ Results of the BGCA evaluations of your organization (historically)
- ▲ Benchmark Reports of Comparable Organizations

#### **Internal Data**

- ▲ Previous year expenses by category (as compared to expense line items).
- ▲ Your 990 Report and Audits
- ▲ Previous year resource development results for each step following category: board giving; individual giving; corporate giving; foundation; and other categories as appropriate for your Club.
- ▲ Results of performance reviews based on staff performance standards
- ▲ Membership records

## Community or External Data

Gather data from the community pertinent to the youth development mission of the Boys & Girls Club. First, consider interviewing a sampling of those in the community with some stake in the Boys & Girls Club. The perception of stakeholders concerning youth in the community and the Club will provide insight for all involved in planning. Usual community stakeholders include:

- ▲ funding source personnel
- ▲ school system personnel and school board members parents
- ▲ youth who are not members of the Club
- ▲ delinquency officials of the courts and law enforcement personnel
- ▲ other youth-serving organization personnel
- ▲ neighborhood and community association members
- ▲ those in the business community

Next, identify community data useful to planning. Collect economic forecast data from economic development or planning committees in your city or county. Of particular value is the annual publication of the Annie E. Casey Foundation, "Kids Count Data Book." The book was mailed to all Clubs by BGCA. To obtain additional copies, contact the regional service center.

The following data is often useful and easy to obtain:

- ▲ economic forecast
- ▲ general population information
- ▲ education information
- ▲ youth health data
- ▲ juvenile crime/delinquency data
- ▲ information regarding other community based youth services
- ▲ funding data such as united way, any past funders, potential funders

After a review of community data list the opportunities available to the Club. Positive opportunities are most apparent, but if there is a negative opportunity, or threat, it should not be ignored as it may become a priority issue requiring attention and resources. Often, an analysis of a negative opportunity defines action to be taken by the Club.

## Themes

In a review of strengths, challenges, and opportunities, determine the themes or threads that run through the data. What clear priorities are apparent? What youth development issues are most prominent? What Club-related issues are most prominent?

## **STEP 4: Develop Strategies for the Future**

Once the strengths, challenges, opportunities and recommendations are analyzed and themes affecting the Club and its services to youth are identified, discuss each theme and write strategy statements that reflect the desired direction of the Club over the next three-to-five years. These recommendations, or strategies, are broad-based statements that often define a major amount of work or significant work for the Club. As a result, Clubs need to develop only major recommendations/strategies for which a work plan will be formed. A strategy does not define ongoing work. Only significant changes to current work and/or new directions for the Club should be considered. It will be helpful to think of strategies in the context of the following:

1. Write those strategies to be focused on the product of the Club—outcomes or benefits to Club members.
2. Write those strategies required to support the eventual production of outcomes defined above.

The planning committee writes the strategies in priority order as a report to the board.

## **STEP 5: Board Votes on Strategies**

## **STEP 6: Convert Strategies into Work Plans**

Strategies are in effect the goals of the B&GC. Upon board approval of the strategies, assignments are made to appropriate individuals and teams (board committees, committee chairs and other board members and staff). They develop:

1. Statements of specific projected achievements or results required to achieve the strategies.
2. A work plan that outlines the implementation steps required. (In this step, it may be advantageous to include **ongoing** programs and activities in the work plan.)
3. A budget to support the total Club work plan. Those responsible for the work must be involved in writing the work plan.

## **STEP 7: Board Votes on Complete Strategic Plan**

The full plan, including work plans and budget plus the implementation steps, is presented to the board of directors by the planning committee. The board should discuss the plan in terms of outcomes. The committee should seek to provide clarity and understanding about the plan. The board then votes to approve the plan.

It is important to note that a board vote on a line item budget is usually of little value. There should be a clear understanding of the major emphasis and their benefits for the community and Club members, as well as a rationale or explanation of the costs to reach outcomes. A vote on the plan at this level is usually of greater value to the Club and develops greater understanding of Club priorities, results and operational costs.

## **STEP 8: Implement and Monitor**

Implement the plan setting monitoring steps or processes. The planning committee should outline reporting steps. These might include:

1. Periodic or quarterly reports to the strategic planning committee.
2. Reporting systems that support the plan.
3. Assignments of reporting and/or monitoring roles to staff and the planning committee.

# Step 1: Worksheet

## Review the Club's Mission

Current Mission of the Boys & Girls Club

Seek involvement of as many persons as possible in the review. Use the following questions to start the review of the mission: (It can be helpful to post the mission for all to see.)

- ▲ Is our mission statement in harmony with that of the Boys & Girls Club Movement?
- ▲ Does it state the purpose of the Club?
- ▲ Does it define the central business of the Club?
- ▲ Should the current situation at the Club impact the mission statement?
- ▲ Does our mission statement express what we are trying to achieve?

Mission of the Boys & Girls Club Movement from: Report of the National Planning Commission
To enable all young people, especially those who need us the most, to reach their full potential as productive, caring, responsible citizens.

List the key words, phrases or thoughts about potential change.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

(Note: Keep the mission statement short.)

When warranted, assign a person to draft an updated mission statement for consideration by the board. It may be helpful to seek the services of a person with “wordsmith” skills to write the draft, i.e., persons from advertising firms, newspaper, or other community sources.

See page 5 of Planning Guide – *Step 1: “Review Club’s Mission”*

## Step 2: Worksheet

### Developing a Vision

#### Vision for the Boys & Girls Club

A vision statement is a specific description of what the Club will be like at a specific time in the future. Addressing any number of the following questions can help:

- ▲ How many youth will the Boys & Girls Club serve?
- ▲ How many service locations will the Club have?
- ▲ What benefits will Club members be receiving (number) years in the future?
- ▲ How will these benefits impact the position of the Club in the community?
- ▲ What funding sources will support the Club as it produces these benefits?
- ▲ What will the staff look like, what will they be doing?
- ▲ What will the board be like, what will they be doing?

See page 5 of the Planning Guide – *Step 2: “Develop a Shared Vision”* for sample vision statements from other Boys & Girls Clubs.

If the above questions are used, summarize by developing a statement that will drive the Club to achieve at the desired level indicated by the discussion.

# Step 3: Worksheet A

## Progress Report

Strategy or Goal	Achievements

## Step 3: Worksheet B

### Strengths & Challenges Chart

From a review of Club internal data including the *Standards of Organizational Effectiveness (SOE)* supplemented by *Standards for Self-Evaluation of Member Boys & Girls Clubs* and other sources listed on page 6 of the *Planning Guide*, identify the strengths and challenges of the Club:

Club Strengths	Club Challenges

## Step 3: Workbook C

### Community Data Review - Opportunities & Threats

*"Community, External Data"* -- From what is known about the community and the review of pertinent data, list the opportunities and threats that are meaningful to the Boys & Girls Club.

Opportunities (positive)	Opportunities (negative)

# Step 3: Worksheet D

## Themes List

LIST APPARENT THEMES REFLECTED IN A REVIEW OF STRENGTHS, CHALLENGES, AND OPPORTUNITIES



# Step 4: Worksheet

## Recommendations/Strategies

LIST THE RECOMMENDATIONS/STRATEGIES THAT RESPOND TO THEMES IDENTIFIED IN THE REVIEW OF DATA:	
1.	
2.	
3.	
4.	
5.	
6.	
7.	

## Step 5: Worksheet A

### EMPHASIS - CONVERTING STRATEGIES INTO WORKPLANS FOR YEAR ONE

Organizational category or key result area:
Emphasis/Strategy statement:
List specific, significant results or outcomes expected:
List actions to be taken to achieve the results, as well as the board and/or staff responsible:
Major projected costs:

## Step 5: Worksheet B

### EMPHASIS - CONVERTING STRATEGIES INTO WORKPLANS FOR YEAR TWO

Organizational category or key result areas:
Emphasis/Strategy statement:
List specific, significant results or outcomes expected:
List actions to be taken to achieve the results, as well as the board and/or staff responsible:
Major projected costs:

## Step 5: Worksheet C

### EMPHASIS - CONVERTING STRATEGIES INTO WORK PLANS FOR YEAR THREE

Organizational category or key result areas:
Emphasis/Strategy statement:
List specific, significant results or outcomes expected:
List actions to be taken to achieve the results, as well as the board and/or staff responsible:
Major projected costs: