



# 5 YEAR STRATEGIC PLANNING

## FIELD GUIDE



WHERE ARE  
WE NOW?



WHERE DO WE  
WANT TO BE?



HOW WILL WE  
GET THERE?

Revised 10/11/2018

A collaboration of  
The Salvation Army, USA Western Territory  
and UCLA Anderson School of Management,  
Net Impact Program.

**NET IMPACT**   
UCLA Anderson  
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DOING THE  
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**Take Your Strategic Plan to the with these added resources:**

- How to Brainstorm & Ideate
- Program Metrics
- SMART Goal Setting
- Vision Casting Exercise
- SWOT Analysis Worksheet
- Brand Story: Learn how to engage your team and community in the story of your Corps

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*"A good plan, violently executed now, is better than a perfect plan next week."*

- General George S. Patton

## I. Introduction to Strategic Planning

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While not exhaustive, the strategic planning guide is intended to provide a strong starting point in the important process of strategic planning for the long-term growth and development of your Corps, so that you will be able to more effectively serve your community. This guide is designed to be used in conjunction with the worksheets, forms and outside resources inventoried in the appendix.

We strongly recommend that you proceed through this guide linearly, from beginning to end. Feel free to expand on sections or provide deeper insights that are relevant to your corps; what's provided here is a good baseline, but it is not the end-all be-all.

We also want to reiterate that your strategic plan is meant to be a *living document*. It will provide an initial starting point and roadmap for your corps, but it will inevitably evolve as you discover and respond to the needs in your community, as you monitor and evaluate current programming, and as you meet with your team and various community stakeholders to evaluate your Corps' progress.

Lastly, while the strategic vision usually comes from corps/center management, it is important to involve stakeholders throughout the strategic planning process. This will ensure a wealth of perspectives and will also help your staff and Corps members be on the same page, allowing your strategic vision to live well beyond your current assignment.

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### a. About Strategic Planning

The term “strategic planning” has been linked to mysterious and sudden headaches, brain fogginess, and mood reversals (if you were in a good mood to begin with, that is). The purpose of this guide is to demystify the strategic planning process and to convince you of its many benefits to both your Corps and to The Salvation Army. In addition, this guide will help your corps better understand the context you operate in, provide a framework for planning, better measure the effectiveness of your initiatives, and give you the tools to communicate the lessons you’ve learned and the successes you’ve had to all stakeholders.

As you will soon see, the actual plan is less important than the process of planning and mapping out your objectives. In fact, both Winston Churchill and Dwight D. Eisenhower remarked on the greater importance of planning versus the actual plan. Effective planning requires deep empathy, nimbleness, a predisposition for action, a willingness to learn from both successes and failures, and perhaps most importantly, optimism. It is often an iterative and cumulative process that will reap the most benefits when consistently used.

## What Is a Strategic Plan?

A strategic plan aligns the Corps mission with its actions. A Strategic Planning Committee (SPC) will create an actionable plan to guide the Corps on how to achieve its mission most effectively. Key goals, action steps, and resources needed should be curated onto a timeline and we recommend measurable metrics be established in order to determine success. Importantly, strategic plans are a work in progress. The purpose of a strategic plan is to provide a roadmap for your Corps, and that roadmap will change as you gather more information and gain new insights. As a living document, your strategic plan should evolve along with your Corps.

## The Ingredients of Successful Strategic Planning

A lot goes into successful strategic planning, but we believe the following qualities are absolutely crucial if you want to maximize your chances of success:

- Community empathy
- Strong collaboration & communication
- Inclusive decision-making
- Brainstorming/ideation
- A predisposition for action
- Willingness to learn from failures and continue iterating
- Establishing metrics
- Storytelling

## The Benefits of Planning

If all this sounds like a lot of work, we do have some good news: a solid strategic plan will better align and focus your Corps, allowing you to accomplish more with the same amount of resources. It will also help you better measure and track the performance of your programs and initiatives. Finally, a good strategic plan will help outsiders better understand the context and the work that your Corps is engaged in - this is especially important if you're looking to engage with donors to secure more funding.

This strategic planning guide was designed to be as collaborative and as interactive as possible. We (the UCLA Anderson School of Management) believe that collaborative thinking and dialogue will usually yield the best possible product.

Throughout the strategic planning process, involve as many people from your Corps as possible...staff, congregation, clients and community members.

Read UCLA's article: How to Brainstorm & Ideate before you get started. It will help you navigate through idea creation in this group environment.

We know it isn't always feasible, but to the fullest extent possible, get the input and perspectives of everyone involved in your Corps. This will naturally get everyone on the same page - to use an old-fashioned boating analogy, if everyone rows together with the same stroke and cadence, your ship will go faster and further.

Lastly, having everyone involved will ensure that you leave a legacy that continues well beyond your current assignment. This strategic planning exercise will lay a solid foundation for staff, your division, advisory board members and incoming officers well into the future.

## b. How to Use This Strategic Planning Guide

This guide is designed to help you and your corps through the strategic planning process. It explains in detail the rationale behind each step as well as some best practice examples for how to take your plan to a higher level of impact. This particular strategic planning template is designed specifically to help focus and align your corps so that you can most effectively serve your community. It is organized with 5 goals in mind:

GOAL	ACTIVITIES
1. Exploring where you are	Identifying stakeholders, forming your strategic planning team, & conducting community assessments
2. Exploring who you are and how you got here	Your mission, vision & core values, programming self-evaluation, financial review, overall performance evaluation
3. Exploring what you will be doing and how you will do it	Targeting community needs, vision casting for the future, and enhancing existing programming
4. Documenting a clear roadmap for how you will go about accomplishing your goals	Capital needs assessment, creating a timeline, goal setting & ensuring accountability
5. Preparing for the future, continuing to tweak strategy, presenting plan to stakeholders	Assessing potential challenges, engaging stakeholders, making adjustments

## A Key to Labels in this Guide

Throughout this guide, you will notice special items labelled as follows:



These items are the baseline minimum we recommend you do to prepare and document your strategic plan.



If you are interested in taking your strategic planning to a higher level of exploration and understanding, follow these guidelines.



When we hear about ideas that are helping other Corps, we have (and will continue to) document them as tips.



Items in BLUE link either to an appendix document or to a web article.

## c. Strategic Planning Team & Timeline



**Establish a strategic planning committee (SPC) and assign roles.**

The SPC should be formed with the intent to give it as much independence as possible and the ability to be effective. It should consist of a variety of stakeholders, including decision makers, program leaders, staff, and clergy. Some examples of participants could be the center/unit Executive Director, Program Directors/Coordinators, Officers, Advisory Board Members and long-term volunteers.

Participation should be voluntary, inclusive, and not limited to the upper echelons of management. It should also include individuals different than those who manage the day-to-day of the center/unit. Additionally, size is a factor here, as the larger the group the more difficult it may be to make decisions and come to conclusions. However, there needs to be enough people so that individual parts of the strategic plan, such as research and information-gathering, can be assigned. For most organizations, a SPC of no more than 10 people is ideal. If more people want to be involved or the committee decides it is in the best interest of the organization, additional people can be brought on as consultants for specific pieces of the plan.

The SPC should also have a direct reporting line to the Board and give regular updates to assess progress, perhaps bi-monthly or quarterly.



**Identify a project manager** that will track both the planning and implementation processes to ensure that you are meeting your goals.

**Categorize action items** into various sectors, i.e. marketing, finance, direct services, etc. as needed, and assign a lead person responsible for each sector. This lead person will be the point of contact to communicate successes and failures after implementation. Involve each section/dept. leader in the assessment of resources needed to accomplish their assignments in coherence to the timeline.

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*"If we are to better the future we must disturb the present."*

- Catherine Booth

## II. Exploration

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### a. What Does Your Community Need?

Every successful strategic plan starts with a deep community empathy. After all, even the best laid strategies and designs are meaningless if they do not effectively serve your target audience. In addition, you also want to make sure that everyone serving in your corps is aligned so that you can most effectively meet the needs of your community. If possible, involve as many people as possible throughout the planning process. Feel free to also assign roles to corps members in order to keep things moving, but ideally have everyone involved so that you can collaborate, brainstorm, and ideate together.

The goal of this section is to understand where you operate (your context).

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### Needs Assessment & Information Gathering

Developing your strategy always starts with an understanding (empathy) for what your community's needs are. This requires not just compassion, but empathy.



**Michael Chapman (2016) in his article “Designing Beyond Empathy”** does a great job highlighting the differences and explaining how IDEO.org, a social-impact design firm, empathizes with the people they design for. Everything else that you do will flow from assessment of your community, so make sure you gather as much information as possible for a more holistic view.

 TAKE ACTION

The first step is to gather information on your community.

In general, try to collect and maintain as much data as possible on your community, with great attention to privacy rules and regulations. Good sources of data include, but are not limited to, the following:

- Frontline workers at your corps (they are closest to the community)
- Parents
- Program participants
- Key community leaders (local authorities, law enforcement, schools, etc.)
- Community organizations (especially those that involve other nonprofits)
- Local government
- Other nonprofits operating in your community

In addition, a variety of methods should be used when gathering information, these include but are not limited to:

- Community surveys/needs assessments
- Focus groups
- One on one Interviews
- Casual conversations
- Observations from your deeper relationships with community members



## NEXT LEVEL

**Google the following terms to learn more about different methods for gathering information:**

- Community Needs Survey
- Community Needs Assessment Questions
- How to Conduct a Focus Group



## TAKE ACTION



## RESOURCE

Use the **COMMUNITY NEEDS WORKSHEET (Appendix A)** to list out the sources you used in assessing your community, as well as some of the insights that you have gained. The more perspectives you have, the more holistic your view!

## Identify New Community Stakeholders

As you gather information about your community, take note of who the key stakeholders in your community are. Stakeholders are defined as any person or organization on inside or outside your center/unit that has a vested interest in the organization's strategic direction. Engaging new stakeholders in the strategic planning process ensures that the process is participatory and community driven.

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## Prioritize Needs

Once you've developed these lists, start prioritizing the community needs. In an ideal world, we would do everything on that list but given limited resources, we need to prioritize.



**Prioritize the needs of your community from *their perspective*.**

Ask yourself...

- What are their biggest needs?
- When filled, which needs would produce the greatest impact over the long term?
- Are there any urgent needs?

Finally, consider the list of needs in terms of The Salvation Army's capabilities and competencies.

Ask yourself...

- Which needs best align with the mission of The Salvation Army?
- Which needs are not being met anywhere else in the church and nonprofit sectors?
- Which needs are we uniquely qualified to meet? (Whether it be through our existing programs, resources, knowledge or experience)



When putting together your 5 Year Strategic Plan, you will use the **PROGRAM RECOMMENDATION FORM (Appendix C)** to identify any new programs or services that you'd like to introduce to your community.

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## Taking Stock of Your Corps

Now that you have a better understanding of your community, the next step is to understand your Corps and how you got to where you are now. In this section, you will evaluate your internal culture, past and current programming, strengths and weaknesses and finally you'll take stock of your current financial position.

## Mission, Core Values, and Vision

You've assessed the needs of your community and now have an idea on what some of the most important issues are! The next step is to look both forward and inward - what kind of a future do you envision for your community and what role will your corps have in shaping that future?

In this section, you will review your MISSION STATEMENT, and spend some time developing CORE VALUES (convictions that influence the way you work together as a team and with your community) and a VISION for the future. It is very important that you do this step with as many of your Corps team (leadership, staff and key volunteers) so everyone feels invested in these core principles and vision for the future.

### Mission Statement

The Salvation Army, an international movement, is an evangelical part of the universal Christian church. Its message is based on the Bible. Its ministry is motivated by the love of God. Its mission is to preach the gospel of Jesus Christ and to meet human needs in His name without discrimination.



**As a team, discuss and brainstorm on the following questions:**

**TIP** Put your thoughts and ideas up on a white board during all discussions, then take a picture before you erase the board. These notes are a valuable reminder to these discussions and your planning efforts.

Over the last year...

- What are the tangible ways our Corps has shared the gospel of Jesus Christ? What are some ways we've shared the gospel through modeling Christ (being like Christ)?
- What community needs have we addressed as a Corps? What are some of the basic needs that we see in our communities, day to day?
- In what ways can we be more inclusive of people that are different than us? Are there groups/populations within our community that we have noticed are underserved and/or marginalized? How might we reach out to these groups?

## Core Values

Your core values are the fundamental beliefs (some people call them convictions) that your corps (and the Salvation Army) abides by. They are guiding principles that reflect how you do your work and how your corps presents itself to the world. These values are truly and passionately held. This belief system is not something that is learned or created. It is not what you hope to become. It is who you are – your core.

If not yet established, your Corps should reflect on the values that define your work and purpose in your community.

### TAKE ACTION

As a team, discuss your Core Values and brainstorm on the following questions:

- Think about someone that was an influence on you as a young person (someone who positively changed the way you thought or behaved) Ask yourself... What did they teach me? What did they model for me?
- What are the indispensable beliefs that make me who I am?
- What do I stand for? What convictions do I personally bring to work?
- How do I expect my coworkers to behave?
- How would I describe my Core Convictions to my children? What are the lessons I will teach them?

 **TIP** Look for commonalities in the values you each hold...many of your Corps' values will come from these convictions you hold in common. Ask yourselves if these values would be just as valid in 20 years? Core Values must stand the test of time. Try to narrow your core values down to a max of five, so that your team can remember them.

### NEXT LEVEL

### RESOURCE

Use the **VISION CASTING EXERCISE** to explore and determine the deeply held convictions of your Corps Team and the vision that they have for the future. Involving a good cross section of leadership and staff in this process will ensure buy-in and follow through for your strategic Plan.

## Vision Statement

A vision statement is an aspirational statement about what you want your community and your Corps to look like at a specified time in the future. It is the ultimate goal that you will be working towards and will guide much of the decision-making at your Corps.

A clear vision statement will serve as the foundation for your strategic planning, will motivate the members of your Corps, and will help focus your efforts. Your vision statement should be clear, concise, measurable, time bound to the next 5-20 years, future oriented and challenging but feasible.

Remember: When your future is clear, you can form plans to make it happen!

### TAKE ACTION

**As a team, discuss your Corps' Vision for the future, and brainstorm on the following questions:**

- What are we building and who are we becoming as a result of showing up every day?
- Where do we want to go? What will we be best at?
- What are some HUGE goals we'd like to achieve?
- How will we make our community more successful?
- What will it feel like to work at our Corps?
- In 10 years, if someone writes an article for a major magazine about your Corps, what will it say?

 **TIP** Record your thoughts and ideas from this brainstorm session and use them in crafting a vivid description (Vision Statement) of what your Corps will look like in the future. Your vision of the future should be clear and concise, but don't worry... it doesn't need to be short. The more clearly you describe your future, the more likely you'll be able to make it happen!

## Assessment of Current Offerings

Unless you are a brand-new corps, take the time to evaluate current programming. Consider evaluating all programs and services that have taken place in the last 12-18 months.



Consider these questions as you fill out a **CURRENT PROGRAM EVALUATION FORM (Appendix B)** for each of your current offerings...

- How effective has this program/service been thus far?
- Do you believe this program/service is viable in the long term?
- Is there anything we need to change for this program/service to move forward?
- Is there a better & more efficient way to accomplish the goals of this program?
- What are the current fully loaded costs of this program?
- Does this program complement the mission of The Salvation Army?
- If you could start from scratch, is this a program/service you would want to offer?

These evaluations will help us learn from both mistakes and successes, so we can make more informed decisions in the future. So, as you look at the various programs and services offered, ask yourself:

*Based on our vision for the future, what current programs should we keep, modify, or eliminate?*

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## Your Strengths, Weaknesses, Opportunities & Threats (SWOT)

Every organization has internal strengths and weaknesses, opportunities to grow their impact, and challenges that can threaten the livelihood of the organization.



**Spend some time thinking about what your Corps is good at and where are you weak by answering the following questions:**

**Strengths:** Characteristics of the organization, or it's program, that give it an advantage over others.

- What are your Corps' strengths?
- What areas of service do you have the most expertise at?

**Weaknesses:** Characteristics of the organization that place the Corps or it's program at a disadvantage relative to others.

- What are our weaknesses? As a Corps? As The Salvation Army?

**Opportunities:** Elements in the environment that the Corps or it's program could use to its advantage.

- What opportunities exist in your community? (*Think about the broad “community” that includes your neighbors, businesses, other churches and nonprofits, educational organizations, the economy, local, state and federal governments.*)
- Can we offer more or different programs to increase our impact?
- Have there been recent changes to the economy or to local culture that may create new areas of impact?

**Threats:** Elements in the environment that could cause trouble for the Corps or it's program.

- What are possible threats to the livelihood of your Corps over the next 5 years?
- Have there been recent changes to the economy, government policy, or fundraising climate that may impact you negatively?



Compare the results of your SWOT evaluation to the list of community needs and current programs you want to keep. **Do any of these new needs or current programs compliment your strengths? Do any program offerings land in an area of weakness or threat?**

Next, prioritize current programs/services (and ideas for new programs) by putting the one's that match with our strengths and opportunities at the top, and the programs in areas of weakness or threat at the bottom.



Check out this [SWOT ANALYSIS WORKSHEET](#) from our digital fundraising partners at Classy.org.

## Review of Current Budget and Future Finances

### TAKE ACTION

Evaluate your financial health at a high level. We recommend that you evaluate the budgets for this fiscal year and last fiscal year. If you have finished preparing next year's budget, review that as well.

When reviewing your budgets, ask yourself the following questions:

- Do we expect any changes to incoming funding sources? (donations, revenues from sales, governmental funds, sponsorships etc)
  - Do we foresee any major changes to outgoing expenses?
  - If we are in deficit, what areas seem to be causing the deficit?
  - Are there programs/services that can be modified to improve your financial outlook?
  - Do we see any positive financial trends over the last 3-5 years that we can expect to continue going forward?
  - What is the state of your local economy, and the trends predicted over the next 5 years?
  - Have you identified any community needs where you could charge a fee for the service, to those in your community that can afford to pay? (examples: child care, day camp, educational opportunities, wellness classes, recreational activities like sports leagues)
- 

## b. Capital Needs Evaluation

What Capital improvements will your Corps require over the next 5 years?

Please Note that these are facility improvements to any Corps buildings, but should not include any furnishings for existing facilities or programs under \$10,000.

### TAKE ACTION

### RESOURCE

Use the [CAPITAL NEEDS WORKSHEET \(Appendix D\)](#) to document each capital improvement.

### III. Creating an Action Plan

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By now, you've evaluated the needs of your community and established (or reminded yourself) of your Corps vision, mission, and core values. You also have a sense of how effective past/current programming has been as well as your current financial position. With all that in mind, it is now time to form your plan of action for the next few years.

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#### a. Increasing Impact – The Ultimate Goal of Strategic Planning!

In *Strategic Planning for Nonprofit Organizations*, authors Allison and Kaye (Wiley 2015) state:

To increase impact is to grow in one or more ways. There are two major ways to grow:

**MORE:** The easiest way to increase your impact is to do more of what you are already doing – to increase scale- which requires an increase in budget and other resources.

**DIFFERENT:** Another option is to do your work differently. The three main ways to do work differently are through:

- **Process improvement** – doing the same work more efficiently and getting better results by doing more with (proportionately) less.
- **Design improvement** – doing the same work in new and better ways to get better results.
- **Strategic improvement** – doing different work, changing your mix of programs to get better results.”

Allison, M., & Kaye, J. (2015). *Strategic Planning for Nonprofit Organizations: A Practical Guide for Dynamic Times* (3rd ed.). Hoboken, NJ: John Wiley & Sons, Inc.

#### TAKE ACTION

Look at all of the preceding community and corps evaluation work to determine programs you want to keep, what processes you can improve, what programs need to be refreshed/redesigned and what new services you should add.

#### RESOURCE

Complete a **PROGRAM RECOMMENDATION FORM (Appendix C)** for any program you want to redesign or add to your mix of services.

Consider if any programs or services should be eliminated.

If there are programs/services that are missionally marginal and financially unsustainable, determine if these programs can be adapted in some way, or if they simply need to be eliminated and the resources shifted to more effective programs/services.

## b. Resource Considerations

Explore what resources will be needed for each program enhanced or added.

- What is needed to make each program sustainable?  
*(Consider needs such as staffing, volunteers, facilities, and supplies)*
- How will you go about securing these resources?



**Recommend a final programming/services mix that you feel would have the greatest impact upon your community over the next 5 years.**

## c. Pro Forma Budget



Produce a pro-forma budget based on prior years, but adjusted to account for addition/removal of programs and services, knowing that adding these additional programs/services will be contingent on the resources available.

## d. Timeline & Goals

Based on your recommended strategy (programming mix, resource and capital needs), establish a high-level timeline for the next 5 years. Keep in mind that you may need to raise funds, retrain staff, and obtain other resources before changes can be implemented.



**Delegate project areas to staff and ask them to set a first round of 90 day goals for each area that is scheduled for action in the coming year. Evaluate progress and set new goals every 90 days.**

*(Research shows that 90 day goals are best because they are long enough to make meaningful progress, short enough to keep you focused, allow you to see an end in sight, and they don't give you enough time to procrastinate.)*



**TIP**



**RESOURCE**

Read UCLA's articles: [\*\*Program Metrics & SMART Goal Setting\*\*](#) to help you establish a process for continued program evaluation.

## Executive Summary

While the executive summary is the first section of any strategic plan, creating it should be done last. An executive summary is a high-level overview that will summarize your findings and recommendations. When well written, it will ensure that readers can rapidly become acquainted with your extensive research, evaluation and recommendations, without having to read the entire report.



**Write your Executive Summary and ask other members of your strategic planning team to review.**

## IV. Document Your Strategic Plan

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**When creating your final strategic plan document, please follow this outline:**

1. Executive Summary
2. Mission, Vision & Core Values
3. Strengths, Weaknesses, Opportunities, & Threats
4. Current Budget (*as defined by Vivid Reporting*)
5. Overview of Program/Service Offering Recommendations
6. Current Program Evaluation Forms
7. Program Recommendation Forms
8. Timeline & Goals
9. Pro Forma Budget
10. Capital Needs Worksheet
11. Emergency Preparedness Inventory

### Storytelling

Use your strategic plan to tell others about the work that you are engaged in! After completing this planning process, you will find that conversations with key stakeholders, community members and potential donors will take on new and deeper meaning.



Read Donald Miller's New York Times bestselling book: ***Building A Story Brand*** and learn how to clarify your message so that your community and donors will listen.





# 5 YEAR STRATEGIC PLANNING FIELD GUIDE

## APPENDICES

A collaboration of  
The Salvation Army, USA Western Territory  
and UCLA Anderson School of Management,  
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## Appendix A Community Needs Worksheet

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As you gather information and spend time discovering what the greatest needs in your community are, document each need as follows:

Description of need:

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How did you learn about this need?

---

Identify new stakeholders & list how they are important to your Corps:

---

**Questions:**

How urgent is this need?

---

How large an impact will be made by filling this need?

---

Does filling this need align with the mission of The Salvation Army?

---

Is this need being met elsewhere in your community?

---

Are we uniquely qualified to meet this need?

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What are the various ways we might meet this need? (*List your ideas here.*)

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## Appendix B Current Program Evaluation Form

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Evaluating our current programs and services will help us learn from both mistakes and successes, so we can make more informed decisions in the future.

*Note: these are defined as programs and services that are over and above the minimum standard as outlined in the Corps Ministry Foundation.*

### NAME OF PROGRAM/SERVICE:

What is being offered with this program and who does it benefit?

---

What are the current fully loaded costs of this program?

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What are the funding streams for this program/service?

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How many people were impacted by this program/service in the last year?

---

How deep is our involvement with the constituent in this program?

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Is this program something we do exceptionally? How so?

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How does this program help build community around The Salvation Army?

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Are there other organizations or competitors that offer something similar?

---

Is there a better & more efficient way to accomplish the goals of this program?

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Based on our vision for the future, do you believe we should keep, modify, or eliminate this program?

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## Appendix C Program Recommendation Form

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We believe the following program/service should either be implemented or revised over the next five years:

**NAME OF PROGRAM/SERVICE:**

This program will be (circle one): New / Enhanced / Reduced / Eliminated

---

What is the rationale for this recommendation?

---

What resources will be required?

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What is the estimated annual cost of this addition or enhancement?

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What impact will this change/addition have on the community?

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How does this change contribute to the vision your team has for your Corps?

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## Appendix D Capital Needs Worksheet

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The management team at \_\_\_\_\_ Corps believes the following capital improvements will be required over the next five years:

*Note: These are facility improvements to any Corps building, but should not include any furnishings for existing facilities or programs under \$10,000.*

**Capital Improvement #1:**

Outline the need for this capital improvement:

---

Estimated Cost for this Capital Improvement:

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Can this be a capital campaign?

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**Capital Improvement #2:**

Outline the need for this capital improvement:

---

Estimated Cost for this Capital Improvement:

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Can this be a capital campaign?

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**Capital Improvement #3:**

Outline the need for this capital improvement:

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Estimated Cost for this Capital Improvement:

---

Can this be a capital campaign?

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## Appendix E Emergency Preparedness Worksheet

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Our Corps has the following facilities that can be used in an emergency: (e.g. gym, fellowship hall, kitchen, bathrooms, showers, etc.):

---

Our Corps has the following equipment that can be used in an emergency (e.g. portable generator, canteen, truck, etc.):

---

Outline below the services that your unit could provide in the event of a natural disaster or other emergency:

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Indicate the facilities and equipment you would feel are necessary to provide more effective disaster response, and better serve the needs of your community in such an eventuality.

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## I. How to Brainstorm & Ideate

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After you assess your community's needs, the next step is to brainstorm ways to meet those needs. It is especially crucial to involve as many staff/volunteers at your center in this step as possible, since you want to generate as many ideas as possible and then decide what approach will work best for your center.

At UCLA, We're big proponents of **brainstorming guidelines inherent to the design-thinking process**. Use the following steps (adapted from IDEO.org's Design Kit class) when leading a brainstorming workshop for your Corps:

1. Defer judgement. You never know where a good idea is going to come from. The key is to make everyone feel like they can say the idea on their mind and allow others to build on it.
2. Encourage wild ideas. Wild ideas can often give rise to creative leaps. In thinking about ideas that are wacky or out there we tend to think about what we really want without the constraints of technology or materials.
3. Build on the ideas of others. Being positive and building on the ideas of others take some skill. In conversation, we try to use "and" instead of "but".
4. Stay focused on the topic. Try to keep the discussion on target, otherwise you can diverge beyond the scope of what you're trying to design for.
5. One conversation at a time. Your team is far more likely to build on an idea and make a creative leap if everyone is paying full attention to whoever is sharing a new idea.
6. Be visual. In live brainstorms we write down on Post-its and then put them on a wall. Nothing gets an idea across faster than drawing it. Doesn't matter if you're not Rembrandt!
7. Go for quantity. Aim for as many new ideas as possible. In a good session, up to 100 ideas are generated in 60 minutes. Crank the ideas out quickly and build on the best ones.

Keep generating ideas, but after a predefined amount of time (30-60 minutes in a session) collectively decide as a group what ideas you want to pursue.

If you posted all your brainstorming ideas on Post-its, a good idea might be to give everyone a different color Post-it, so they can vote for their favorite ideas.

## Brainstorming/Ideating Worksheet

What are some ideas that your corps came up with to address your community's needs?

COMMUNITY NEED	BRAINSTORMS/IDEAS
1. Need One	Brainstorm/Ideas for Need One
2. Need Two	Brainstorm/Ideas for Need Two
3. Need Three	Brainstorm/Ideas for Need Three
4.	
5.	
6.	
7.	
8.	

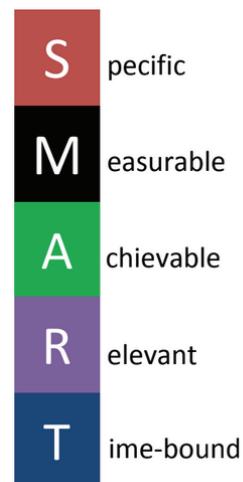
## II. SMART Goal Setting

---

Once you have selected a few ideas, the next step is to develop some goals. When developing goals, it is a good practice to set SMART goals, which are:

This might initially seem intimidating but bear in mind that the purpose of setting SMART goals is not to limit or constrain you. Rather, setting SMART goals will help you break down a daunting goal into smaller and more manageable chunks. It will also help you stay on track.

Let's take the example of Pierre, a bright young French newsboy who decided to lose some weight as his 2018 New Year's resolution (*Éclairs aux chocolat* are a staple of his diet). As Pierre faces the daunting challenge of having to lose weight, let's look at how he might phrase his goal:



*"In the future, I see myself as a more active and healthy person."*

*"My first goal for achieving this vision is that I will lose 6 kilos of weight over the next 4 months."*

*"In order to lose 6 kilos over the next 4 months, I will try to lose about 1.5 kilos every month by doing at least 45 minutes of exercise every day. I will also eat at least one piece of fruit and vegetable with every meal and maintain a maximum consumption of 1,800 calories."*

You will notice that Pierre's initial statement very broad and generic. It's a good target to have, but it doesn't specify *how* he might go about achieving his goal. In his second statement, Pierre elaborates by including specific and time-bound metrics (6 kilos of weight over the next 4 months). Finally, in Pierre's last statement, he fleshes out his goal even further by stating exactly *how* he will go about achieving it (lose 1.5 kilos a month, exercise 45 minutes a day, etc.). Now, Pierre knows exactly how he will go about achieving his weight-loss goal.

Why is it important to make our goals time-bound?

Parkinson's Law states that "work expands so as to fill the time available for its completion." By providing hard time limits to our goals, we can help ensure that we accomplish them in a timely manner. The sooner we accomplish one of our goals, the sooner we can move onto the next one!

## SMART Goals Worksheet

GOALS	SUB-GOALS	MEASUREMENT/TIME
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

### III. Program Metrics

---

Metrics are simply the way you can measure the impact that your corps has. They are almost always quantitative and should capture the scale, scope, and effectiveness of your programs:

#### Scale

Your metrics should convey the number of people (the scale) your programming and your center/unit touches. The number of individuals/households served is usually a good way to express this. Bear in mind that context really matters here - 20 people might not sound like a lot, but in small communities or in more niche services that can represent a significant percentage of the total population.

#### Scope

Your metrics should also describe the different types of people/communities (the scope) that your program caters to. Oftentimes, it is useful to combine the scale and scope into a single metric (e.g., 27 4th graders enrolled in ballet class).

#### Effectiveness

Measuring effectiveness is probably the most difficult metric to establish, but it is also the most important. A good metric will allow you (and others) to understand how effective you are at meeting the goals you established earlier. It will inform you with the insight to double down on fruitful endeavors and to cut your losses on unproductive programming. Most importantly, it will allow you to gauge how well you are serving your community.

Finding one number to convey all that information is difficult (though SROI might come close), so you will likely need to use several metrics to properly describe your programming. Choosing the right metrics is not an exact science; there is no formula to solve for the right metrics for any situation. If you need some inspiration, refer to Exhibit A on the next page for a list metrics that we came up with.

#### Monitoring & Evaluation (M&E)

Monitoring and evaluation is exactly as the name implies - observing the results of your programming and then evaluating what your next steps will be. You can use the metrics that you established to measure results; with more data, you will be able to make more informed decisions and better understand programming efficacy. Commit to a monitoring and evaluation schedule. Metrics are most useful if you consistently measure them over a period of time. In this section of the strategic planning template, discuss how you intend to monitor and evaluate your programs.

## Exhibit A - Example Metrics By Service Type

SERVICE TYPE	EXAMPLE METRICS (NOT EXHAUSTIVE!)
Arts/Music Education	<ul style="list-style-type: none"> <li>• # of students/participants</li> <li>• # total hours of instruction</li> <li>• # performances given</li> <li>• Pre/post art/music education test (e.g., how many students can identify F on Treble Clef before and after education)</li> <li>• Value of education provided relative to private vendor rate (\$ saved by families)</li> <li>• Duration of involvement per each student (e.g. on average how many months each student continues to participate in your program)</li> </ul>
Childcare/After-School Program	<ul style="list-style-type: none"> <li>• # of children per day/week/month</li> <li>• # of total hours</li> <li>• Pre/post education test</li> </ul>
Community Care Ministries/Visitation Services	<ul style="list-style-type: none"> <li>• # of individuals/households reached</li> <li>• # of hours spent ministering/visiting</li> </ul>
Counseling/Case Management	<ul style="list-style-type: none"> <li>• # individuals/households served</li> <li>• # of hours of service provided</li> <li>• Conversion rate (% of people graduating from program)</li> <li>• Long term success rate (% of graduates who do not relapse)</li> <li>• Average length in program</li> </ul>
Employment/Job Preparation Services	<ul style="list-style-type: none"> <li>• Types of services offered</li> <li>• # individuals served</li> <li>• # of resumes reviewed, # hours interview coaching, etc.</li> <li>• Conversion rate (% successes)</li> </ul>
Emergency Disaster Services (EDS)	<ul style="list-style-type: none"> <li>• # households/individuals reached</li> <li>• # units of supplies distributed</li> <li>• # hours/days/weeks/months disaster relief provided</li> </ul>
Emergency Assistance (Food, Rent, Utilities)	<ul style="list-style-type: none"> <li>• # households/individuals reached</li> <li>• Amount of money/assistance provided</li> <li>• Conversion length (average length of time on service)</li> <li>• Conversion rate (% of participants who no longer need service over specific period of time)</li> </ul>

## NEXT LEVEL RESOURCES

<b>Health, Fitness &amp; Nutrition</b>	<ul style="list-style-type: none"> <li>• # participants</li> <li>• Size of community gardens</li> <li>• # hours of teaching</li> <li>• Pre/post testing (e.g., % of participants pre and post who will go out and play sports instead of watching tv, playing video games, etc.)</li> <li>• # hours of activity</li> </ul>
<b>Housing Assistance</b>	<ul style="list-style-type: none"> <li>• # households/individuals reached</li> <li>• Amount of money/assistance provided</li> </ul>
<b>Medical/Dental Clinic</b>	<ul style="list-style-type: none"> <li>• # individuals served</li> <li>• # hours of dental work provided</li> <li>• # operations/cavities filled, etc.</li> <li>• \$ value of service provided/subsidized for community (relative to a private practice)</li> </ul>
<b>Other Adult Services</b>	<ul style="list-style-type: none"> <li>• # individuals served</li> <li>• # total hours of service (aggregate or per type of service)</li> </ul>
<b>Prison Visitation/Correctional Services</b>	<ul style="list-style-type: none"> <li>• # of visits/# hours of visits</li> <li>• # individuals served</li> </ul>
<b>Residential Camping Program</b>	<ul style="list-style-type: none"> <li>• # campers/# camping hours/# camping days</li> <li>• # activities (in activity units, hours, etc.)</li> </ul>
<b>Spiritual Support Services</b>	<ul style="list-style-type: none"> <li>• # individuals/households served</li> <li>• # of hours of service provided</li> <li>• Ratio of support services to</li> </ul>
<b>Substance Use Treatment/Rehabilitation</b>	<ul style="list-style-type: none"> <li>• # individuals/households served</li> <li>• # of hours of service provided</li> <li>• Conversion rate (% of people graduating from program)</li> <li>• Long term success rate (% of graduates who do not relapse)</li> <li>• Average length in program</li> </ul>

## Metrics Worksheet

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GOAL	METRICS	MEASUREMENT FREQUENCY
1. Goal One	Metric battery for goal one	Every day/week
2. Goal Two	Metric battery for goal two	Every day/week
3. Goal Three	Metric battery for goal three	Every day/week
4.		
5.		
6.		
7.		
8.		

# Strengths, Weaknesses, Opportunities, and Threats

A SWOT analysis is generally presented in a four-quadrant chart to evaluate your strengths, weaknesses, opportunities, and threats. Assess these elements of your organization and fill out the chart below.

	<b>Strengths</b>	<b>Weaknesses</b>
INTERNAL	<p>What is your organization amazing at?</p> <input type="text"/>	<p>What areas haven't you committed time to yet?</p> <input type="text"/>
EXTERNAL	<p>What differentiates you from other nonprofit organizations serving your cause?</p> <input type="text"/>	<p>Where did you fall short last year?</p> <input type="text"/>
	<b>Opportunities</b>	<b>Threats</b>
INTERNAL	<p>Do you have a novel approach?</p> <input type="text"/>	<p>What aspects of your strategy didn't have a positive ROI last year?</p> <input type="text"/>
EXTERNAL	<p>What fundraising trails do you have yet to blaze?</p> <input type="text"/>	<p>What factors put your organization at risk?</p> <input type="text"/>
	<b>Opportunities</b>	<b>Threats</b>
INTERNAL	<p>Is your organization dedicated to fostering innovation and growth?</p> <input type="text"/>	<p>What political or environmental issues, if any, surround your cause?</p> <input type="text"/>
EXTERNAL	<p>What organizations might strengthen your value proposition through partnership?</p> <input type="text"/>	<p>Do you face any managerial challenges, such as high turnover, in your day-to-day operations?</p> <input type="text"/>







# 5 YEAR STRATEGIC PLANNING FIELD GUIDE

**CREATING YOUR  
CORPS/TEAM  
VISION**

**TAKE ACTION**

This document is authored by Michael Nichols at [www.michaelnichols.org](http://www.michaelnichols.org). Small additions have been made by USW Salvation Army to bring relevance to our organizational structure.



**DOING THE  
MOST GOOD®**



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## I. Introduction

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### DO YOU KNOW WHERE YOU ARE HEADED?

Most organizations have a vision statement somewhere in a file or on a conference room wall. Yet, unfortunately, these vision statements rarely lead to exponential growth and remarkable success for the organization.

In a recent meeting with a university department team, I asked them how developing a Business Vision could help their team. Every member of the team believed that a department vision would significantly enhance collaboration, communication, and performance. Several team members expressed that they had seen organizational vision statements but had never seen a vision for an individual, for a team, or for a department. And they had never considered developing one.

While creating a vision for your work can be one of the most challenging experiences in your life and career, it will be one of the most rewarding. A vision is energizing. It's enlivening. Vision is the guiding motivation for all great human efforts.

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### A STRUGGLING LEADER

Early in my career, I experienced a number of incredibly difficult challenges in a relatively short period of time. I know you've been there too. Although my team was experiencing record-setting achievements, relationships were strained and my influence was dwindling. I couldn't make sense of it. I didn't understand why my colleagues resented my passion for my work, my aggressive goals, and the long hours I put in. I loved my work. I loved the outcomes. I loved my team. I loved how they were growing.

But it never occurred to me that my passion, energy, and achievements would intimidate those around me. After all, I was laser-focused on improving the organization we were all part of. Their fear morphed into resentment. I began pushing harder, defending the vision and strategy, and reacting to challenges.

As you might imagine, none of this improved the situation. In fact, it made matters worse. Finally, two administrators shared with me what should have been obvious – "Michael, your team doesn't trust you. Some don't even like you."

This feedback was extremely painful for me to accept and even more difficult for me to understand and process. I was in denial. I simply could not bring myself to see from their perspective. Yet I was convinced that the work environment was not sustainable – for me or for my team.

## CREATING YOUR CORPS/TEAM VISION

So, on the recommendation of a friend, I hired Building Champions executive coach Raymond Gleason to help me work through life and business planning, priority management, and decision-making. This decision was a life-changer for me. In fact, shortly after I made this decision, Sarah (my wife) and I sat at dinner with several of our friends while they joked about how differently I now approach my life and work. My experience with creating a life plan and a Business Vision, regularly reviewing them, and updating them, has been transformational.

These documents have kept me on track as my family, friends, career, and other interests have grown. My life and work are fast-moving. And when work gets hectic, my Business Vision and plans get me back on the path to my envisioned destination.

Creating your Vision can change how you approach your life and work forever.  
Are you ready?

---

### ONE IMPORTANT RULE

Creating your Team/Corps Vision will take much thought and time. You will need to do some deep thinking, even some soul searching to create something that is of value. So, I have **one important rule**... Your vision should be completed in an environment that helps you to think deeply and creatively.

If you are working on a career vision or a vision for your position, I recommend that you **plan a minimum of a full day away to work on your vision.**

Get away from home, away from the office, away from distractions. Go on a retreat, visit a park, the mountains, the beach – go somewhere you will not be interrupted or distracted by your phone, email, or people. Don't take your computer, tablet, or smart phone. Writing out your vision by hand is an important part of the process – it helps with reflection, processing, and deep thinking.

If you are working on a vision with your team, plan the day away from the office. Consider a local restaurant, clubhouse, or hotel meeting room that is quiet and free from distractions and where you'll have plenty of room to work. Take a white board, flip chart, and easel. Have fun with it!

 **TIP** Have each team member ready this article and ask them to work independently on their position vision before coming together to brainstorm on your team vision.

## The Basics

I don't have to tell you that personal growth and organizational growth require clear, compelling vision. Developing a vision – **what your work will become** – and getting it down on paper will allow you to create very specific plans for accomplishing it.

So, where do we start? In this book, I will share with you step-by-step how to create a vision for your work. Your Team/Corps Vision will help you move forward with clear intent and purpose. Your vision doesn't need to be long. My own vision is surprisingly short – less than two pages long.

It consists of four sections:

- Core Convictions
- Core Purpose
- Huge Goals
- Vivid Description

## II. Your Vision

---

Before you get started, it is important to decide the type of Business Vision you are working on – career vision, position vision, team vision, or Corps vision.

While this tool will effectively guide you through each of these, the type of vision will determine your perspective, how you answer questions as you work through this guide, and how you craft your vision.

Throughout this worksheet I will refer to “the team/corps” – if you are working on a career or position vision, just substitute the term that describes the vision type you are working on. So, let’s figure out which one makes the most sense for you...

**Career Vision.** If you’re just starting out in your career or you are considering a career change, you are going to complete a vision for your career.

**Position Vision.** Have you been working in your field, organization, or position for a while? Are you planning to continue in this position or a similar position? A position vision is specific to your area of responsibility. Keep in mind that your position vision is always subject to the approval of your supervisor.

**Team/Corps Vision.** If you lead a team or you are part of a team that is working together to develop a vision, this tool can guide your team discussions and the development of a team vision. A team vision is a collaborative effort with your team.

### WRITE DOWN THE TYPE OF VISION THAT YOU ARE GOING TO CREATE:

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## CREATING YOUR CORPS/TEAM VISION

Remember, as you work through the rest of the worksheet, to replace “team/corps” with the appropriate type of vision you’re working on – career or position vision.

**Vision Is What You Will Become.** And if you can see it, you can build it. So, what do you see?

Your answer to this question will help you to develop the vision and strategy to move forward with clear intent and purpose, whether you are leading a team of 100 or simply leading yourself. When complete, your vision will act as a giant magnet pulling you forward, regardless of challenges and crises that occur.

Your vision begins with you addressing your **Core Convictions** and **Core Purpose** which answer the following questions:

- What are the indispensable beliefs that make you who you are?
- What do you stand for?
- Why do you exist?

Next, you will identify one or more **huge, long-term goals** and develop a **vivid description** of what the future of your team/Corps will look like. Going through this process will provide a target to aim for as your organization grows and changes. It will also allow you to communicate your vision to those around you.

Now, you are ready to craft your Team/Corps Vision. You are about to create a vision that will serve as a constant guide for your team’s work for years to come. Let’s Get Started!

We all want to belong to something – something bigger than ourselves. Vision is the invitation to others to belong to something compelling, something bigger, something great. So, ask yourself...

What do I, or what does my team, want to belong to?

Who are we?

You are trading your time to work with your team and organization. And people are trading their time to work together with you... **are they trading it for something that is worthwhile?**

### III. Core Convictions

---

We start with Core Convictions – the driving passion in our heart; what motivates us. Here's how Daniel Harkavy, CEO of Building Champions, describes Core Convictions:

*"Some call them core values. I like Core Convictions because convictions are stronger than values. And the term convictions clearly communicates that they are non-negotiable. Core Convictions are not the same as values – they are stronger than values. They define what we stand for. They are worth fighting for and taking significant risk for. They are non-negotiable. They are portable – we would take them with us no matter where we work."*

Core Convictions must be authentic and discovered within the Corps (or team or yourself, depending on the type of vision you are creating). They are intrinsic, not aspirational. Convictions describe who we are, not who we want to become. They are truly and passionately held. This belief system is not something that is learned or created. It is not what you hope to become. It is who you are – your core.

You should address your Core Convictions as they truly exist, not as you want them to be. If you don't, those around you will not be able to believe in you or your vision. We hold our Core Convictions even if they become a competitive disadvantage. We would not change our convictions in response to market changes – we would rather change markets to remain true to Core Convictions.

Your convictions improve clarity and decision-making because all decisions are filtered through them.

**So, ask the following questions to determine your Core Convictions.**

- What do I stand for? Why do I exist? What convictions do I personally bring to work?
- How would I describe my Core Convictions to my children?
- If I were to start a new organization tomorrow in a different line of work, what Core Convictions would I bring to it?

**Once you write your list of convictions, evaluate them by asking:**

- If I had enough money to retire, would I continue to live these Core Convictions?
- Do I envision them being just as valid 20 years from now as they are today?
- Would I hold these Core Convictions even if one or more of them became a competitive disadvantage in the marketplace?

#### Examples of Core Convictions

**From the Author:**

1. Everything I do connects people with God more substantively.
2. I am committed to the ongoing development of talented team members, and I am strategic about who is added to my team and how I develop their unlimited potential.
3. I maintain simplicity in processes and procedures to focus on delivering WOW experiences through great service.
4. I am committed to great decisions based on solid research and data.

**THQ Kroc Team Core Convictions:**

1. Strive to do the best work you can with the resources you have.
2. Be dynamic... not static; energizing those around you.
3. Bring a supportive & facilitative attitude to all you do; going the extra mile to provide positive answers and resources.
4. Set expedience aside and always do what is in the best interest of God's Will, that we love others.

**! TAKE ACTION**

Use the **PERSONAL CORE CONVICTIONS WORKSHEET (Appendix A)** to brainstorm your personal Core Convictions.

Next, if working on a Team Vision or a Corps Vision, work as a team on the **TEAM CORE CONVICTIONS WORKSHEET (Appendix B)** to brainstorm your group Core Convictions.

With relentless honesty, identify 3-5 Core Convictions that are truly central to your life and work. Remember, convictions must stand the test of time.

**NOW, SUMMARIZE YOUR CORE CONVICTIONS BELOW:**

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_

## IV. Core Purpose

---

Your Core Purpose is what you are all about. It is your reason for existing and reflects your deepest motivation for doing your work. It captures your soul and the soul of your team or organization. It reveals who you exist to serve and why, and includes how you will impact the marketplace and/or your community.

Your Core Purpose should elicit emotion within your team and your market. In the Harvard Business Review article, Building Your Company's Vision, Collins and Porras observed that you can fulfill your purpose every single day, but you will never achieve your purpose. It's something that you constantly pursue throughout your life.

**Ask these questions to determine your Core Purpose:**

- Why are your products or services important?  
Once you have that answer, then ask, Why is THAT important? Then ask it again. And again - five times. After a few "whys" you'll find that you are getting down to the core of your fundamental purpose.
- Suppose you went out of business and your products or services were discontinued. Your operations shut down. The organization ceased to exist.  
What would be lost? Why is it important that it continues to exist?
- If you had enough money to retire, would you still keep doing what you do? If so, why?

**Examples of Core Purpose**

**From the Author:**

To enable purposeful and lasting life-change within every person I lead and coach so they achieve maximum growth and health in their life and work.

**THQ Kroc Team Purpose:**

Provide sound guidance that will enable our Community Centers to increase efficient and effective delivery of Salvation Army mission.

### TAKE ACTION

Use the **CORE PURPOSE WORKSHEET (Appendix C)** to brainstorm your Core Purpose.

#### NOW, SUMMARIZE YOUR CORE PURPOSE BELOW:

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## V. Envisioned Future

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Now that you've defined your Core Purpose, you can focus on what lies ahead. Your Envisioned Future involves what you will build and what you will become. When the future is clear, you can form plans to make it happen.

So, what are you building and who are you becoming as a result of showing up every day?

The Envisioned Future consists of two parts:

- **Huge Goals.** What are you building?
- **Vivid Description.** What it will be like to achieve the goal. What are you becoming?

Here's how the team at Building Champions describes an Envisioned Future:

*"We're inviting people on a journey – taking them to the base of Mount Everest, pointing to the summit, and inviting them to go with us. For others to decide if they want to make the trek, they need to know what the journey is going to look like. Why is it important that they understand the journey? Because somewhere between Kathmandu and the summit of Mount Everest a storm is going to hit, supplies will run low, there will be disagreements, tempers are going to flare, there will be challenges, there will be struggles."*

Are you currently experiencing a challenging situation at work? The Envisioned Future allows you and the team to come back to it – to see that you expected the struggles and challenges.

It reminds you where you are headed – who you are becoming. The Envisioned Future is the mountain to be climbed. It needs to be so compelling that it keeps your team motivated long into the future, even after you retire or move on.

## a. Mount Everest Goals

There is a fundamental difference between merely having a goal and committing to a huge, exhilarating challenge. Jim Collins, best-selling author of *Great by Choice*, calls these huge goals Big, Hairy, Audacious Goals or BHAGS. Daniel Harkavy refers to them as Mount Everest Goals.

They are clear and compelling. They serve as unifying focal points of effort and act as catalysts for team spirit. They have a clear finish line – your team will know when it has achieved the goal. They are tangible, energizing, and highly focused.

**So, ask these questions to determine your Mount Everest Goals.**

- What are we building?
- Where do we want to go?
- What will we be the best at?

**After you draft your goals, evaluate them by asking:**

- Is it specific? Is it clear?
  - Is it measurable?
  - Is it time-sensitive? When will you achieve it?
  - Will it stretch you? If you are leading a team, your Mount Everest Goals should be appropriate for you and your team and should inspire them.
  - Does it inspire a long-term commitment to the adventure? Goals that require only short-term commitments are not Mount Everest Goals.
  - Will some doubt your (or your team's) ability to accomplish it? People should question how you will accomplish your Mount Everest Goals.
- 

## Examples of Mount Everest Goals

**From the Author:**

My wife, Sarah, recently developed a vision for her counseling work. Here are a few examples of her Mount Everest Goals:

1. Partner with a counseling organization, large corporation, or university with strong Christian convictions and high interest in innovative coaching and counseling development.
2. Develop a 50 to 100 acre nationally-known retreat center equipped with 15-20 spacious, self-sufficient rooms in which clients are able to focus, relax, heal, and re-energize.
3. Counsel 250 clients annually.
4. Coach 50 clients annually.
5. Become the model process and center for coaching and counseling.

You may have noticed – these are huge goals!

## CREATING YOUR CORPS/TEAM VISION

Your Mount Everest Goals should attract some cynics and naysayers. In fact, even I question how Sarah will accomplish some of these. But I've already seen the remarkable progress she's made toward them in a short period of time.

Your goals should be huge! If your goals aren't ambitious and challenging, they're probably not worth attempting. So, in a way, your critics are right – you can't get there; not on your own. But together with your team, with your customers, with your community – you can get there.

### TAKE ACTION

Use the **MOUNT EVEREST GOALS WORKSHEET (Appendix D)** to brainstorm your Mount Everest Goals.

**NOW, SUMMARIZE YOUR MOUNT EVEREST GOALS BELOW:**

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Now, **CIRCLE ONE GOAL** that represents your Mount Everest summit. What does the top of the mountain look like for you and your team?

## b. Vivid Description

The Vivid Description is a specific, vibrant, and engaging description of what it will be like to achieve your Mount Everest Goals. It translates the vision and goals from words into pictures. A compelling Vivid Description includes passion, emotion, and conviction.

**Ask yourself the following questions to create your Vivid Description:**

- What will the organization (or department or position) become in the future?
- What will it look like for team members?
- How will it make clients more successful?
- We're sitting here in 10, 20, 30 years – what would we love to see?
- What should the organization (or department or position) look like?
- What should it feel like to my team?
- What should it have achieved?
- If someone writes an article for a major business magazine about the organization (or department or position) in 10 years, what will it say?

As you draft the Vivid Description, consider a few key areas of your organization, products, and services, some of them may be:

<b>Leadership</b>	<b>Training</b>	<b>Marketing</b>	<b>Ministry</b>
<b>Donor Relations</b>	<b>Sales</b>	<b>Communication</b>	<b>Celebrations</b>
<b>Social Services</b>	<b>Internal Culture</b>	<b>Community Relations</b>	

Take leadership... What does the leadership team look like that is able to reach 29,035 feet, the summit of Mount Everest? If you don't already have these people on your team, you will need to develop them or you will need to find new team members.

## Example of A Vivid Description

### From the Author:

This is an excerpt from Sarah's Vivid Description for a coaching and counseling retreat center:

*"The retreat center surpasses every person's imagination – it is an oasis that is professional yet personal. The retreat grounds are immaculate and peaceful in every season. The furniture and décor is current and welcoming. A housekeeping team gives attention to every detail throughout the center. An executive chef prepares the finest cuisine.*

*Teams, couples, and individuals discover a relaxing place to stay providing relief and rest from pressures of life and work. Guests enjoy spa services free of charge through donor scholarships. Therapeutic art experiences allow clients to process thoughts, feelings, and behaviors and obtain clarity. Walking trails that lead through wooded forests and serene outdoor recreation facilitate reflection and focus. The center is safe, secure, and serene.*

*The retreat center is a place for non-clients to visit, stay, utilize the prayer garden, relax in the spa environment which includes an indoor pool, spa, and fitness center, or simply get away for a few days. The center will include office space, a library, an industrial kitchen, and innovative meeting and educational space to accommodate up to 75 people."*

### ! TAKE ACTION

Brainstorm your Vivid Description on the **VIVID DESCRIPTION WORKSHEET (Appendix E)**. Don't be shy, include everything! You will likely need a page or two for your Vivid Description.

## VI. Bring It All Together: The Vision Document

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Now take everything you have documented above and compile your vision document. List the components in the following order:

1. Core Convictions
2. Core Purpose
3. Mount Everest Goals
4. Vivid Description

Most importantly, **SHARE YOUR VISION EVERY CHANCE YOU GET!**

Talk about it daily in your interactions with colleagues. Illustrate it and share success stories in your regular team meetings. Use it when hiring new team members. They should have the opportunity to decide if they are interested in going on the journey with you – before they accept the position.

Use it in employee evaluations as you assess performance and communicate new objectives. Use it when developing and updating business plans and strategic initiatives. **Use it. Use it. Use it.**

Your work, your team, your influence, your leadership, your energy, will never be the same because of this one purposeful decision. When you can see it – you can build it!

### REVIEW AND COMMUNICATE IT

Your vision must be regularly reviewed and communicated, or it will have little impact on your life and work. So, once you complete it, the first thing to do is establish a weekly or monthly time to review it. I go over my Team Vision every Monday morning.

Then, communicate it every chance you get – to your team, within your organization, with potential employees, with new vendors, customers and with your community.

To accomplish vision, a change in culture must occur. And, when it is regularly and clearly communicated, people have the opportunity to understand, take ownership, and live out the vision. So talk about it everywhere you go!



**RESOURCE**

Also consider reviewing the article in this packet titled: “Creative Ways to Implement Vision in Your Organization”.







# 5 YEAR STRATEGIC PLANNING FIELD GUIDE

CREATING YOUR  
CORPS/TEAM  
VISION

APPENDICES

This document is authored by Michael Nichols at  
[www.michaelnichols.org](http://www.michaelnichols.org). Small additions have been made by USW  
Salvation Army to bring relevance to our organizational structure.



DOING THE  
MOST GOOD®



## Appendix A Personal Core Convictions Worksheet

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Convictions describe who we are, not who we want to become. They are truly and passionately held. This belief system is not something that is learned or created. It is not what you hope to become. It is who you are – your core.

Think about someone that was an influence on you as a young person (someone who positively changed the way you thought or behaved) Ask yourself... What did they teach me? What did they model for me?

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What are the indispensable beliefs that make me who I am?

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What do I stand for?

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Why do I exist?

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What convictions do I personally bring to work? How do I expect my coworkers to behave?

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How would I describe my Core Convictions to my children? What are the lessons I will teach them?

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If I were to start my own business or non-profit organization tomorrow, what Core Convictions would I bring to it?

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**Appendix A PERSONAL CORE CONVICTIONS WORKSHEET**

Evaluate your convictions by asking yourself the following questions, and eliminate any items that get a “No”:

- If I had enough money to retire, would I continue to live these Core Convictions?
- Do I envision them being just as valid 20 years from now as they are today?
- Would I hold these Core Convictions even if one or more of them became a competitive disadvantage in the marketplace?

**Now, list your Core Convictions**

With relentless honesty, identify 3-5 Core Convictions that are truly central to your life and work. Remember, convictions must stand the test of time.

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3. \_\_\_\_\_  
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5. \_\_\_\_\_  
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## Appendix B Corps/Team Core Convictions Group Exercise

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### PRIOR TO THIS EXERCISE, ASK ALL TEAM MEMBERS TO:

- Read the “Creating Your Corps/Team Vision” article
- Complete the “Personal Core Convictions” worksheet (this is a personal exercise and should not be shared, but it’s helpful if they have it handy for this part of the process)

Team convictions should be discussed and brainstormed as a group. Select one team member (not the leader) to be the facilitator. The facilitator simply asks the questions, and writes the answers on the dry erase board or paper chart in front of the group. The facilitator should also contribute answers, but they must let others speak first.

### GOALS

- Get as many answers as possible on the board
- Put “on the table” the things you each hold dear, both in your head and your heart

### RULES

- Each team member must contribute answers
- You are not allowed to debate or comment on the value of any person’s contribution – they are all equal

### As the exercise starts, read the goals & rules to the team then remind them:

Convictions describe who we are, not who we want to become. They are truly and passionately held. This belief system is not something that is learned or created. It is not what you hope to become. It is who you are – your core.

### BRAINSTORM QUESTIONS

- What do you stand for?
- Why do you exist?
- What convictions do you personally bring to your work?
- How would you describe your Core Convictions to a new team mate?
- If you were to start your own business tomorrow, in a different line of work, what Core Convictions would you bring to it?

*(if the brainstorm stalls, ask the team to take a few minutes to review their Personal Core Convictions worksheet and share how they might bring these convictions to the team/Corps environment)*

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**Appendix B    CORPS/TEAM CORE CONVICTIONS WORKSHEET****ONCE THE BRAINSTORM IS COMPLETE:**

1. Ask the team to evaluate the answers and find commonalities. Put a star next to these items.
2. Ask each team member to identify one or two convictions that resonated with them. Put a star next to these items.  
*(A fun variation on this is to give star stickers or pens to each teammate and ask them to go to the board and put stars next to the items that most resonate with them. They should all go up at the same time, as to not make anyone feel singled out.)*
3. With your phone, take photos of all brainstormed items, and share with the team via email or Trello.
4. Have team select one member - someone good with words and writing - to take a stab at narrowing all the starred items into 4-5 concise statements of conviction. (see examples in article "Creating Your Corps/Team Vision) *It is best to make this decision on the fly. Do not pre-select someone.*
5. In 1-2 weeks, they'll share these Core Conviction statements with the team and ask the team to evaluate, with relentless honesty, the following questions (remember, convictions must stand the test of time):
  - a. do you feel these convictions ring true to what you see in the brainstorm photos?
  - b. Will these convictions be just as valid 20 years from now as they are today?
  - c. Would we hold these Core Convictions even if one or more of them became a competitive disadvantage in the marketplace?

**MAKE REVISIONS AS NEEDED, THEN SHARE THE FINAL RESULTS WITH THE TEAM.**

## Appendix C Core Purpose Worksheet

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Your Core Purpose is what you are all about. It is your reason for existing and reflects your deepest motivation for doing your work. It captures your soul and the soul of your team or organization. It reveals who you exist to serve and why, and includes how you will impact the marketplace and/or your community.

Why are your products or services important?

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Now tell us WHY these things you just wrote are important?

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*We are going to ask again – at least 3-4 more times, because after a few “whys” you’ll find that you are getting down to the core of your fundamental purpose.*

And why is it, that these things above are important?

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And why is it, that these things above are important?

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And why is it, that these things above are important?

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## CREATING YOUR CORPS/TEAM VISION

### Appendix C CORE PURPOSE WORKSHEET

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Suppose you went out of business and your products or services were discontinued. Your operations shut down. The organization ceased to exist.

What would be lost?

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Why is it important that it continues to exist?

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If you had enough money to retire, would you still keep doing what you do?

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If yes, why?

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### REVIEW ALL YOU HAVE WRITTEN ABOUT CORE PURPOSE

Now draft a simple but compelling statement of purpose:

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 **TIP** *TIP for the Team/Corps: Have some fun by brainstorming this worksheet with your team. Turn it into a Group Exercise by following the goals, rules and general parameters of the **CORE CONVICTIONS GROUP EXERCISE WORKSHEET** included in this packet.*

## Appendix D Mount Everest Goals Worksheet

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There is a fundamental difference between merely having a goal and committing to a huge, exhilarating challenge. Mount Everest Goals are clear and compelling. They have a clear finish line – your team will know when it has achieved the goal. They are tangible, energizing, and highly focused. Many like to call these BHAGS – Big, Hairy, Audacious Goals.

### **What are we building?**

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Are these things specific?

Are they measurable?

Are they time-sensitive?

### **Where do we want to go?**

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Are these things specific?

Are they measurable?

Are they time-sensitive?

### **What will we be the best at?**

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Are these things specific?

Are they measurable?

Are they time-sensitive?

**REVIEW YOUR RESPONSES AND DRAFT YOUR GOALS!****HUGE GOALS**

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3.

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4.

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**NOW, EVALUATE THESE GOALS BY ASKING:**

- Will it stretch you? If you are leading a team, your Mount Everest Goals should be appropriate for you and your team and should inspire them.
- Does it inspire a long-term commitment to the adventure? Goals that require only short-term commitments are not Mount Everest Goals.
- Will some doubt your (or your team's) ability to accomplish it? People should question how you will accomplish your Mount Everest Goals.

***If you answer “NO” to any of these questions, remove that goal from your list—It’s just not big enough!***



**TIP** *TIP for the Team/Corps: Have some fun by brainstorming this worksheet with your team. Turn it into a Group Exercise by following the goals, rules and general parameters of the **CORE CONVICTIONS GROUP EXERCISE WORKSHEET** included in this packet.*

## Appendix E Vivid Description Worksheet

The Vivid Description is a specific, vibrant, and engaging description of what it will be like to achieve your Mount Everest Goals. It translates the vision and goals from words into pictures. A compelling Vivid Description includes passion, emotion, and conviction.

As you draft the Vivid Description, consider a few key areas of your organization, products, and services, some of them may be:

<b>Leadership</b>	<b>Training</b>	<b>Marketing</b>	<b>Ministry</b>
<b>Donor Relations</b>	<b>Sales</b>	<b>Communication</b>	<b>Celebrations</b>
<b>Social Services</b>	<b>Internal Culture</b>	<b>Community Relations</b>	

For example, leadership: What does the leadership team look like that is able to reach 29,035 feet, the summit of Mount Everest?

 **TIP** *TIP for the Team/Corps: Have some fun by brainstorming this worksheet with your team. Turn it into a Group Exercise by following the goals, rules and general parameters of the **CORE CONVICTIONS GROUP EXERCISE WORKSHEET** included in this packet.*

What will the Team (Corps or your position) become in the future?

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What will it look like for team members?

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How will it make clients/customers/community members more successful?

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## CREATING YOUR CORPS/TEAM VISION

### Appendix E VIVID DESCRIPTION WORKSHEET

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We're sitting here in 10, 20, 30 years – what would we love to see?

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What should the Team (Corps or your position) look like?

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What should it feel like to my team?

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What should it have achieved?

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If someone writes an article for a major industry magazine about the organization (or team or position) in 10 years, what will it say?

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Appendix E     VIVID DESCRIPTION WORKSHEET

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**REVIEW YOUR RESPONSES AND BEGIN TO DRAFT YOUR VIVID DESCRIPTION.**

You will likely need a page or two for your Vivid Description. Feel free to add additional pages as needed.

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