Developing ideas into actions

Strategic Planning

For Glider Club Operations

SSA

Soaring Society of America

Contents

This strategic planning syllabus has been developed for use by glider clubs with volunteer leadership and members. This outline is designed to offer a framework from which a club can begin building a vision for what it could become, a mission to establish a path, and strategic objectives that cause progress in the desired direction. The usefulness of this outline is dependent on the ability of the clubs elected leadership and natural leaders from within the membership, to facilitate the process.

This syllabus is offered as a service to the soaring community with the hope that glider clubs will find it a useful tool in the quest for progress.

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Glider Club Operations
Development of a Strategic Action Plan

Preface

Strategic management is a process for conducting the activities of an organization for progressive renewal, growth, and transformation. The objective is to assess the current situation, circumstances, or perspective and determine a path to advance the organization.

Without a strategic plan in place, in many cases, things happen to change the course of a club operation. Some of these occurrences may be good for the club and some may be detrimental to the organization. The key element is that the club is always in the reactive mode, resulting in a response without the benefit of broad roadmap.

The fact of the matter is this – **It is not possible for a glider club to remain status quo and stay healthy and vibrant.** A club may "have its act together" and consider no changes necessary to continue in its current circumstance. The problem is that the world around the club will change and the over time demographics of the members will change. These external changes will, at some point, make the current conditions no longer relevant. Organizations cannot balance on the plateau of status quo; the club will either advance or decline, but chaos theory says it cannot remain the same.

The purpose of strategic planning is to establish a visionary path for the club's future, and then manage progress down that path to achieve the desired outcome. This method of operation ultimately allows the club to focus resources and energy toward desired goals, rather than simply reacting to circumstances with short term thinking.

Glider clubs are composed of people from all walks of life who share a love of aviation and soaring. During strategic planning exercises a wide range of perspectives, feelings, and convictions will arise from the membership. Some people will be energized by the possibilities; others will be intimidated by the prospect of change. Some members will want to change everything and others will resist changing anything. The art of consensus building is essential to the success of advancement.

In almost every group there are those who will embrace change and naysayers who resist change. Those who resist change may do so for a variety of reasons - fear of change; lack of vision; nostalgia for the old days; trepidation of a poor outcome; selfishness; or lack of willingness to compromise.

Key phrases that identify naysayers include statements that exhibit these attitudes:

- "We've always done it this way"
- "We tried that and it didn't work"
- "We can't afford that so don't even discuss it"
- "That's not possible"
- "Half the membership will quit"
- "We'll loose the support of _____ " (name an individual)
- "We don't know how to _____"
- "That will be the worst thing we've ever done"

To counter resistance to change and negative thinking consider the following infamous predictions. While in hindsight these statements are humorous, note that at the root each one lacks a vision for how things could be. A narrow focus is not a friend to possibilities and advancements:

"Everyone acquainted with the subject will recognize it as a conspicuous failure" *- Henry Morton, President of the Stevens Institute of Technology on Thomas Edison's first demonstration of the electric light, 1879.*

"Heavier than air flying machines are impossible" *- Physicist Lord Kelvin, 1895.*

"I think there is a world market for maybe five computers" *-- Thomas Watson, Chairman of IBM, 1958.*

"Computers of the future may...perhaps only weigh one and a half tons" *- Popular Mechanics, 1949*

"The bomb will never go off. I speak as an expert in explosives" *- Admiral William Leahy, U.S. Atomic Bomb Project.*

"What use could this company make of an electrical toy" *- Western Union President William Orton, rejecting Alexander Graham Bell's offer to sell his telephone company for $100,000*

"Airplanes are interesting toys, but of no military value" *-- Marshal Ferdinand Foch, French Military Strategist, 1911*

"Who wants to hear actors talk" *- Harry M. Warner, Warner Bros., 1927*

Setting the stage for change to be accepted and embraced by the club membership is an integral function of strategic planning. **The vision and the voice must be woven into a fabric where dreaming and scheming are an accepted part of the planning process.** The management genius in making a strategic plan work is facilitating the discussions, building a consensus, and navigating through the pitfalls than may derail the plan. Your club can become anything the members envision with the collective desire, planning, commitment, and action.

The Strategic Planning Process

I. Develop a Club Vision

1. Assemble a group of club members who have an interest and commitment to the advancement of the club, problem solving, and sustainability of soaring interests.

   a. Ideally, these individuals will possess these qualities:

      1. Demonstrated management ability – professionally or within the club
      2. Good thinkers – analytical and creative
      3. Able to think big picture and long-term
      4. Good communicators
      5. The ability to neutralize personal bias
      6. Insight into the larger world of soaring

2. Engage in a **vision** exercise - Describe the vision for the club in terms of dreams for how things should be.

   a. Facilitate a dedicated meeting or workshop focused on the group's vision, capture:

      1. Dreams for the club or initiatives leading toward a dream

      2. What success would look like?

      3. How things ought to be

      4. What people and conditions would look like if things were consistent with that picture?

   b. Consolidate the streams of ideas into multiple vision statements. Review for conciseness. The statements should be very short, focused, and positively framed. Examine the multiple statements:

      1. Identify vision statements with substance

      2. Choose vision statements that "resonate" for the group

      3. Select/edit the several that are particularly effective in conveying the group's dreams (as appropriate)

      4. Check to see that everyone's voice is heard in the final selections

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c. Form a consensus on the <u>best</u> statement that concisely expresses the vision of what the club could become.

II. Develop the Club Mission

1. State the **mission** of the club - the what and why

   a. Develop a mission statement that includes what is to be done and why it is to be done.

      1. Describe the essential "what" of the organization or initiative by reviewing its core functions and current programs and activities (e.g., enabling, training, advocacy, support)

      2. Explain the essential "why" of the organization or initiative by reviewing the vision statements

      3. Frame the mission statement as a concise sentence that captures the common purpose (essentially what and why)

   b. Review the mission statement, making sure it is:

      1. Clear regarding what is to be done and why

      2. Concise (often one sentence)

      3. Outcome oriented

      4. Robust - it leaves open a variety of possible means

      5. Inclusive - reflects the voices of all people who are involved

> **Planning Tip**
>
> It is beneficial to involve a wide range of members on the strategic planning team.
>
> Include the most experienced members, along with the newest club members. New members can provide the insight that comes with a fresh perspective. Pilots who fly frequently and those who fly infrequently will contribute with different perspectives.
>
> It is essential to have the club leadership involved, along with a broad cross section of the membership.

III. Develop the Objectives

1. State the **objectives** in terms of specific steps describing what will be accomplished and by when.

   a. In developing objectives, clearly describe:

      1. The markers or benchmarks that would help assess where we are now (baseline or current circumstances) and where we will be if the specific objective is successful.

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    a. For example: Glider fleet modernization – Describe what an updated fleet would consist of if the organizations efforts are successful. Steps toward this modernization could be measured against the objective.

    b. Another example: Increase membership and training capabilities - Describe the capabilities of the club with more members; and what training requirements will accompany the growth. Steps toward this goal might be measured by the number of members and instructors.

b. Review the objectives to determine if they are "SMART-C":

    1. Specific

    2. Measurable (at least potentially)

    3. Achievable

    4. Relevant (to the mission)

    5. Timed (date for attainment)

    6. Challenging (will promote advancement)

c. Be flexible with deadlines in creating objectives - defining objectives is time consuming and may require second and third considerations for completeness and as new information is acquired.

Planning Tip

Depending on the size of the club, a planning group of about 8 to 15 participants provides good brain storming interaction.

If a group smaller than 8 individuals becomes polarized on some issue, creative interaction is more difficult.

With groups of over 15 participants it may become difficult to get the "mass" traveling in the same direction.

IV. Develop the Strategies

1. Identify the **strategies** - how things will be accomplished.

    a. In developing strategies, identify:

        1. The levels or areas to be targeted - i.e., financial, club organization, leadership, task assignment, member commitment, etc.

        2. Whether the strategy will be universal - Considers all of those who may or may not benefit; i.e., long-term members, new members, casual pilots, X-C pilots, contest pilots, non-flying members, students, instructors, etc.

        3. Individual member and environmental factors to be addressed by the initiative

a. Individual member factors may include: knowledge, skills, experience, training, club cultural norms/practices, financial capabilities, club social structure, average member age, member availability.

b. Environmental factors may include: airport facilities, local support, available resources, site stability and sustainability, regulations, availability of potential member pool, etc.

4. Those who can most benefit and contribute and how they can be reached or involved in the effort

    a. Targets of change - those who may at particular risk or perceive marginal benefit from a change

    b. Agents of change - those who may be in a position to contribute to the initiative (includes targets of change)

    c. Soaring community resources through which targets and agents of change can be reached, educated, or involved.

5. How can these strategies be supported - approaches may include:

    a. Providing information and club communications - e.g., conduct a club survey to determine opinions from each member. Use results to support strategic objectives.

    b. Modifying barriers and enhancing opportunities - e.g., Increasing number of annual flights with the addition of another tow-plane.

    c. Enhancing services and support - e.g., increase the number of gliders to allow easier access. Or, provide members with the opportunity to fly club ships X-C.

    d. Changing incentives and disincentives that affect the issue - e.g., rework dues structure to make it more attractive to more members. Spread club workload across a wider group of the membership. Develop more instructors or tow-pilots.

> **Planning Tip**
>
> The group leader must play the role of a facilitator.
>
> Enabling a discussion, even if it goes down an undesired path, is sometimes necessary to get all of the groups thoughts on the table.
>
> The facilitator should make sure all participating members are heard by asking for opinions of individuals who are not actively furthering the conversation.

e. Modifying policies and practices to make more sense in the current situation, e.g., rethink field operations management, or the leadership structure of the club.

6. For each strategy, consider what programs, policies, and/or practices should be created or modified. Make a list, keeping in mind how they work together to address the problem or goal.

b. Review the strategies for:

1. Consistency with the overall vision, mission, and objectives

2. A realistic fit with the resources and opportunities available

3. Anticipated resistance or barriers and how they can be minimized

4. Whether those who are affected are can be reached

5. Whether those who can contribute are involved

2. Select particular club structural change, operating system modification, or resource condition to be addressed that will result in the accomplishment of your goals and objectives

a. For each strategy, identify the specific intra-club group and systems changes; i.e., new or modified programs, policies, and practices; or intervention elements to be sought or implemented - e.g., providing training and enhancing skills

1. Look at the combined elements of strategies for possible changes across different strategies, systems, and intra-club groups.

2. Allot ample time (schedule multiple sessions) to complete the planning group's full list. Consider all proposed issues.

b. After compiling a list of potential changes, review each item or systems change and consider its:

1. Importance to the overall mission

2. Feasibility within potential resources

c. Secure a formal decision from the group on what issues or systems changes will be sought or implemented. A hierarchy of progression may be established at this time.

V. Develop the Action Plan

1. Identify **action** steps for each change - who is going to do what by when, describe:

   a. What specific change or aspect of the strategy will occur

   b. Who will carry it out

   c. When the plan will be completed or for how long it will be maintained

   d. What resources (money and effort) are needed

   e. Who should know what about this in detail?

2. Evaluate the quality of the overall action plan for:

   a. Completeness - Are all the changes and efforts intended by the planning group included?

   b. Clarity - Is it apparent what will be done; who will do it; and when will it be done?

   c. Sufficiency - If all that is proposed were accomplished, would it meet the group's mission and vision? If not, what additional changes need to be planned and implemented to move toward the larger vision?

   d. Currency - Does the action plan reflect the current feasibility? Does it anticipate possible future opportunities and barriers?

   e. Flexibility - As the plan unfolds, is it flexible enough to respond to changes that have not been anticipated? Can it be modified as objectives are accomplished or goals broadened? Can it proceed if particular individuals are not participating?

3. Using the strategic and action plans:

   a. Communicate the initiative's purpose to the general membership and others who are potential resources.

> ### Planning Tip
>
> Don't rush the strategic planning process.
>
> If a pressing matter requires an immediate decision it is a tactical issue, rather than a strategic issue.
>
> It may take multiple meetings to develop initial ideas, reflect on them, and come back with additional thoughts.
>
> Sometimes the best consensus comes after rethinking a previous discussion.

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1. Indicate who should know about the club's vision, mission, objectives, strategic and action plans
2. Describe how this initiative(s) will communicate the club's new framing of what it does and why

   b. Check the action plan against the club's core functions

      1. Does the plan correlate with the core values and vision for the club? Is it a step in the direction of transforming the club into what it can become?
      2. Describe why club members should embrace this plan.

   c. Find common ground and anticipate potential conflict

      1. Identify potential disagreements about ends and means that the group is facing.
      2. Indicate how you might use this new framing of the problem to build consensus

   d. Plan how to detect/discern opportunity

      1. Identify the criteria that will be used to judge an "opportunity". These might include qualities such as:

         a. Consistency with the vision
         b. Consistency with the mission
         c. Contributes to the action plan

      2. In light of the vision, mission, and action plan - pinpoint new or emerging opportunities for the club planning initiative or organization.

   e. Identify potential partners

      1. Indicate who is out there who can help the club achieve its vision and mission. List organizations or individuals that share the common avocation.

4. Begin implementing action planning steps. Choose the order by considering:

   a. Which changes need to be completed before others? Some changes may require other changes and relationships to be established.

> **Planning Tip**
>
> When implementing action items consider bring the "high probability of success" items to the top of the list.
>
> Success breeds success. By building credibility within the membership, and creating enthusiasm for the effort, creative change tends to begin to take on a life of its own. When that happens the work becomes easier and more fun.

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b. Which changes are easier/quicker? Could completing them give the members a sense of success and provide the organization with examples of the benefits of progress?

c. Which changes are the most important or key to the initiative's objectives?

d. Which changes would inspire and encourage participants and build credibility within the club?

VI. Evaluate, Adapt, and Control Progress

1. **Evaluate** the action plan at regular intervals. **Adapt** as your effort grows and the objectives are accomplished or conditions change.

    a. Reassess action items if barriers prevent positive movement or progress is too slow

    b. Modify action plans if conditions change, but in reference to moving toward the vision and mission.

2. **Control** the process. Once implemented, the results of strategy must be measured and evaluated. Measurements toward goals should be developed to ensure progress in the anticipated direction.

3. Understand that implementation of strategic plans is a dynamic and continuous process.

    a. A change in one component can affect other components

    b. The planning process must respond to changing conditions

    c. While specific action items may change in nature or timetable, stay focused on movement toward the larger goals.

> **Planning Tip**
>
> Adapting the planning objectives to changing circumstances is a key for long-term progress.
>
> If a roadblock to the success of the plan becomes apparent, devise a new plan that circumvents the barrier.
>
> Don't assume a vision cannot be reached because the "plan" goes off-track. Review – adapt – control – review – adapt – control….

VII. Strategic Planning Pitfalls

4. Strategic plans that have the best intentions and motivations can become stalled by an unforeseen event or go off-track in a variety of ways. **Situations to avoid or carefully manage include:**

    a. Club leadership failing to make commitment and movement toward the vision a top priority.

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b. Jumping from the mission development to specific strategy implementation without sufficient time to determine and consider what is critical to the success of the mission.

c. Club leadership failing to communicate the plan and incremental progress to the membership.

d. The club leadership making intuitive decisions that may not be inline with the formal plan; or decisions that may be expedient for the moment but don't advance toward the larger goals.

e. Failing to monitor progress.

f. Allowing an individual to become a process bottleneck.

g. Failure to create a climate where change is embraced.

h. Failure to create a collaborative effort that embraces detractors.

i. Taking a rigid approach that excludes creativity. Flexibility is in order to properly adapt on the fly. (The way it's always been done is a decidedly negative element!)

j. Treating the strategic planning as something different from the general management of the club.

k. Becoming so adsorbed in current issues and problems that long-range goals fall by the wayside.

> **Planning Tip**
>
> Success at all costs may not be success at all. True success is measured by reaching a goal, preserving club harmony, having the general membership excited by the progress.
>
> The genius of strategic planning is in getting everyone involved to see the vision.
>
> Once the "vision" is ingrained in the general membership the process becomes a true collaborative effort.

5. Success of a strategic plan (and the advancement of the glider club) is management related. Time and energy invested in maintaining the status quo is wasted. Change is required for progress. Individuals who doggedly insist on resisting change may have to be dealt with by:

a. Selling them on the vision/mission and turning them into supporters for the overall good of the operation

b. Minimize them in the clubs scheme of operation as being out of the mainstream thinking of the membership.

c. As last resort, eliminate persistent detractors from creating barriers to progress.

6. To avoid fractures within the membership, change must be promoted with extreme sensitivity and finesse. The voice of detractors must

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always be heard and thoroughly considered. One goal is to turn the naysayers into allies using management skill and club relationships. Additionally, strong willed individuals with good intentions must be helped to understand that they need to be flexible in the consensus building process. Success at all costs may not be success at all. True success is measured by reaching a goal, preserving club harmony, having the general membership excited by the progress.

Strategic Planning Resources:

Web Sites:

1. An example of a good strategic plan:
   http://www.nursingsociety.org/about/strategic_plan.html#goal1

2. Another example of a very well done strategic plan:
   http://www.chesapeake.edu/generalinfo/StratPlan_ent_03.pdf

3. Strategic Planning Models
   http://www.mapnp.org/library/plan_dec/str_plan/models.htm

4. Developing a Strategic Plan
   http://www.gurusoftware.com/GuruNet/Business/Topics/StrategicPlan.htm

5. ASTM Manual for Development of Strategic Plans
   http://www.astm.org/COMMIT/planmanual98.pdf

6. Steps of a Strategic Planning Process
   http://www.nonprofits.org/npofaq/03/24.html

Books: Look-up – www.amazon.com

1. Applied Strategic Planning: How to Develop a Plan That Really Works
   -- Leonard Goodstein

2. Simplified Strategic Planning: A No-Nonsense Guide for Busy People Who Want Results Fast! -- Robert W. Bradford

3. Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook
   -- by Michael Allison, Jude Kaye

About the Author:
Bob Lacovara serves is a Director and Immediate Past President of Philadelphia Glider Council, in Hilltown, PA. He is a contributing editor to Soaring Magazine and holds glider and SEL ratings. Professionally, Lacovara is Technical Director for the American Composites Manufacturers Association.

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