The **Strategic** Planning **Kit**

STRATEGY
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For Scouting to increase its impact on the world today, all of its component parts, the National Scout Organisations (NSOs), must grow and develop. To do this it is essential that NSOs have a strategy and implement it.
This kit is designed to help with this process.

World Organization of the Scout Movement
Organisation Mondiale du Mouvement Scout

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Introduction

The growth and impact of Scouting world-wide has been a success over the past 95 years and Scouting continues to have an impact on the world today. As Scouting prepares to celebrate its centenary in 2007, it is important that the Movement develops a strategy to meet the rapidly changing needs of the 21st century, so that it can maintain its impact and remain attractive to young people, particularly adolescents. A Strategy for Scouting was adopted at the World Scout Conference in Thessaloniki in July 2002.

The Strategy for Scouting starts from the Mission of Scouting. The mission is a statement of what Scouting seeks to achieve and provides a common starting point for the adoption and implementation of the strategy. A vision has been agreed, and from this shared vision seven strategic priorities have been identified. It is through Scouting responding to these seven priorities that the vision will be realised.

Adopting a strategy at world level is very important but it is only when NSOs develop their own strategic plans and take action to implement these plans that sustained development and growth will take place. NSOs will have their own priorities and it is important that each association is helped to clearly identify its own strategy, as growth is only possible through the development and implementation of a strategic plan.

This kit is designed to help associations with the process of strategic planning.

Part 1: The Strategy for Scouting - provides information on the framework and the content of the Strategy for Scouting and sets out the process for the implementation of the strategy.

Part 2: The Strategic Planning Process – sets out definitions of strategic planning terms, a flowchart of the strategic planning process and sets out the three phases of strategic planning: -
• Phase 1 – Planning
• Phase 2 – Implementation
• Phase 3 - Evaluation

Part 3: A Modular Workshop on Strategic Planning - provides a framework and the content of training modules on strategic planning. This training is modular and can therefore be provided over 4 consecutive days or as individual modules over a longer period of time.

Part 4: Worksheets – these are practical tools to support the workshop modules.

Part 5: Handouts – each handout provides information on theories and concepts used in strategic planning and includes references to the sources of information. The facilitator's inputs to the workshop sessions should be based on this information and the participants can receive the information as 'handouts'.

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Part 6: Presentations – some material is included to facilitate the presentation of the various topics during the workshop modules.

In addition to running the series of modules on strategic planning for a specific target audience, it is important to gain the commitment of key players and decision-makers in an association. It is also necessary to involve people at all levels of the association in the strategic planning process. Advice on these topics is also included in the kit in the section on the commitment process (2.4).

The format and content of this kit has been kept as simple as possible. There are a number of resources available to associations to support the introduction and implementation of the strategic process. These include videos, PowerPoint presentations, CD-ROMs and paper resources; all of which are available on the WOSM web site http://www.scout.org

With the sharing of good practice between associations and with support available from the World Scout Bureau and the Regional Offices, strategies can be developed across the Movement, enabling Scouting to thrive as it moves towards its centenary in 2007.

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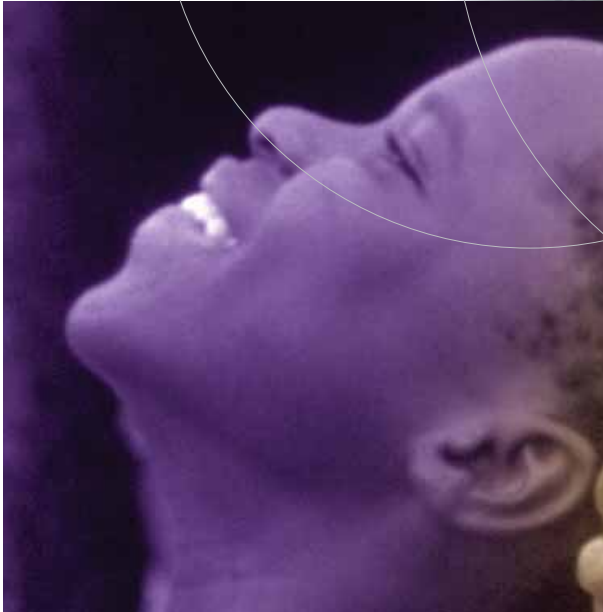
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The Strategy
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The Strategy for Scouting

The Strategy for Scouting, adopted in 2002, recognises that each NSO has its own needs and consequently has its own starting point. The Strategy for Scouting therefore is not a rigid plan of action to be followed step by step. It is a framework for action, based on our mission and a shared vision of how we want Scouting to be in the future. The adoption of the strategy is the result of the work done at all levels of WOSM in recent years, with the starting point the adoption of the Mission Statement in Durban 1999.

1.1   THE BACKGROUND

The development of a strategy for Scouting started in 1988, when the key challenge of helping young people to respond to the rapid changes taking place in society was identified. In response to this challenge, work was undertaken in four areas: Youth Programme, Adult Leadership, the Management of Associations and WOSM's own financial resources. Growth was added as an additional area of work in 1990 and discussions on *'Scouting for What?'* and *'Scouting for Whom?'*, which were to lead to the development of a mission statement, were a key element of the World Scout Conference in Oslo in 1996.

The mission statement, which re-affirms Scouting's role in today's world and was adopted in 1999 at the World Scout Conference in Durban, provides a common starting point for the implementation of the strategy in national associations.

1.2 THE STRATEGIC PLANNING PROCESS FOR THE WOSM STRATEGY

The process for developing the Strategy for Scouting follows the general strategic planning process set out on page 21.

The values of Scouting are clearly stated in WOSM's Constitution in the Definition, Purpose and Principles of Scouting (step 1). The Mission Statement was adopted in 1999 and materials to support the understanding of the mission have been developed (step 2). A vision statement was drafted and amended, following consultation with different groups of people at world, regional and national levels (step 3). Over a period of time a situation analysis took place, involving volunteers and staff at various levels of the Movement (step 4). From this analysis and the vision for the future, a number of priorities were identified and proposed as the strategic priorities. These are the topics which need to be a focus for action for Scouting to achieve its mission and realise its vision (step 5).

Following the adoption of the Strategy for Scouting at the World Scout Conference in Thessaloniki, the operational level was put in place and objectives and action plans have been identified and agreed for each of the strategic priorities (steps 6 & 7).

The Strategy for Scouting is now in the implementation phase. Part of the preparations for the next World Scout Conference in Tunsia in 2005 will be to review progress and to determine how the strategy will be evaluated and the impact measured. These are important areas because it is only by identifying and measuring the impact that we will know we are achieving the mission of Scouting.

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1.3   SETTING OUT A FRAMEWORK FOR THE STRATEGY

To facilitate an understanding of the process undertaken to develop the statgy, a framework for the Strategy for Scouting was developed. This is important to help people locate the work in a timeframe, particularly as it may take a number of years to complete the development of a strategy. The framework for the strategy contains information on:

The Mission – a common starting point, agreed in Durban in 1999.
The Key Challenges – identified in Durban as on-going challenges for NSOs.
The Strategic Areas – a new dimension to ensure that there is an integrated approach to work in the strategic priorities. Activities in each of the three strategic areas should be considered: young people, adults, and structures and systems.
The Vision – sets out what we want Scouting to be like in the future.
The Strategic Priorities – meet the needs identified in the gap between the 'current situation' and the 'vision for the future'. Further information on the seven strategic priorities is set out below.
Expected Results – the tangible outcomes at world, regional and national levels, which, when achieved will help Scouting to realise its vision.
WOSM's Support – the support that will be provided by WOSM, the World Scout Committee, the World Scout Bureau and the Regional Committees and Offices, to help associations achieve the expected results.

1.4   THE SEVEN STRATEGIC PRIORITIES

The strategic priorities have emerged from the successes and challenges in NSOs and Regions in recent years. They represent the key topics to be addressed in Scouting world-wide, although their relevance at national level obviously varies and will therefore be taken into account differently in national and regional strategies and plans. The seven strategic priorities are:

Strategic Priority 1: Youth Involvement - revitalising the Scout Method. This strategic priority aims at assisting NSOs in revitalising this fundamental element of our Movement, which is crucial to its effectiveness and its ability to achieve its mission.

Strategic Priority 2: Adolescents - supporting their transition to adulthood. This strategic priority aims at supporting NSOs in responding effectively to the needs and expectations of adolescents. This will result in an increase in membership in this age-range and enhance Scouting's reputation as an organisation which helps young people in their transition to adulthood.

Strategic Priority 3: Girls and Boys, Women and Men - respecting differences, promoting equality and sharing responsibility.
The aim of this priority is to identify the support and tools required to help NSOs offer equality of opportunity to girls and boys, women and men at all levels in Scouting. This should offer new opportunities for everyone and, through an increase in youth membership and adult leadership, result in a more even balance in the male: female ratio in associations.

Strategic Priority 4: Reaching Out - breaking down barriers and working with broader segments of society.
The aim of this strategic priority is to support NSOs in identifying and responding to the needs of young people, adults and society where Scouting is currently not having an impact. This should result in an increase in membership and increase Scouting's impact in the world today.

Strategic Priority 5: Volunteers in Scouting - developing new approaches to broaden the base of adult support.
This strategic priority aims at redefining the concept of volunteering as applied to Scouting and reviewing policies and practices to help NSOs recruit and retain a new group of adults in Scouting.

Strategic Priority 6: An Organisation for the 21st Century - becoming flexible, lean, innovative, and participatory.
This strategic priority aims at assisting NSOs as well as WOSM itself at world and regional levels, to adopt a strategic approach, reviewing their structures, systems and management to enable them to be sensitive to the changing needs of society and to respond quickly and effectively.

Strategic Priority 7: Scouting's Profile - strengthening communications, partnerships and resources.
This strategic priority aims at strengthening Scouting's communications, partnerships and resources at all levels as these are vital in supporting the work to achieve the mission.

At the 36th World Scout Conference in 2002 in Greece, three strategic priorities were selected for WOSM to focus on over the next triennium. They are:

SP1:   Youth Involvement - revitalising the Scout Method.
SP5:   Volunteers in Scouting - developing new approaches to broaden the base of adult support.
SP7:   Scouting's Profile - strengthening communication, partnerships and resources.

At WOSM level, these three strategic priorities will be given added emphasis until the next World Scout Conference in Tunisia in 2005. However, all the seven priorities remain equally important and valid for the overall purpose of achieving our Mission. Some NSOs may wish to consider other priorities, which are deemed more important than the above three, given their current situations and circumstances.

1.5   THE CONSULTATION PROCESS

For a strategy to be successful it has to become 'everybody's business'. It is important therefore to involve people at all levels in the Movement in the preparation and planning of the strategy. There has been wide consultation in the development and adoption of the Strategy for Scouting and there is a commitment to continue and develop this involvement as the strategy moves to the implementation and evaluation phases. The specific actions to support this are:

- The mission statement was developed following discussions at two World Scout Conferences (Oslo and Durban).

- There was consultation at all levels in the Movement in the situation analysis and drafting the vision statement.

- The draft framework of the strategy was shared with National Scout Organisations for comment, six months before the World Scout Conference in Thessaloniki.

- The outcomes of the discussion groups at the World Scout Conference in Thessaloniki provided a key input to the content of the 'expected results' and 'WOSM's support'.

- Information and tools have been developed and shared with associations and to facilitate the sharing of information and progress in all areas of the Strategy for Scouting. All the information and tools are available through the strategy pages of the WOSM web-site http://www.scout.org/strat/indexen.shtml

- Presentations on the Strategy for Scouting have been integrated into workshops and training events in the Regions.

- Information on the Strategy for Scouting is included, in an appropriate format of all WOSM events.

The work undertaken to monitor, review and evaluate the strategy will be a fully participative process.

The Strategy for Scouting has been developed and is being implemented using the strategic planning process which is outlined in this kit and set out in detail in the following sections.

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The Strategic Planning Process

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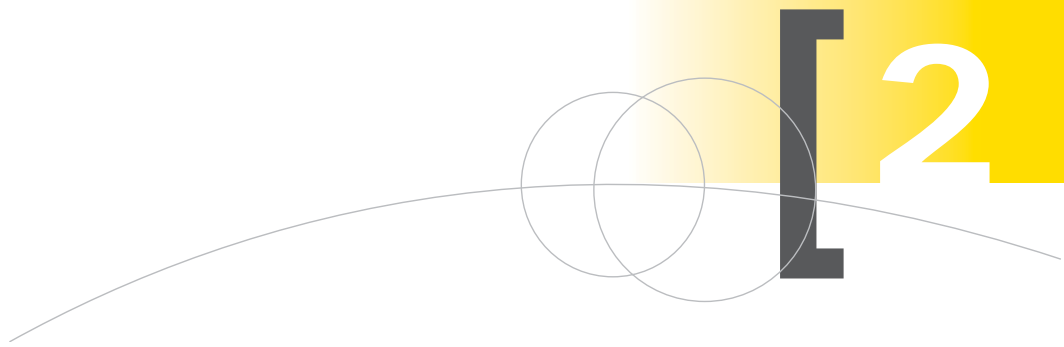
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The Strategic Planning Process

There are several key steps in the strategic planning (SP) process and each step is based on basic management concepts. This section explains the definitions of the terms used and associated with strategic planning so that users will have a clearer understanding of the entire process. The terms are described in the order set out in the flowchart on page 21, i.e. values, mission, vision, situation analysis, strategic priorities, objectives and action plans.

2.1 DEFINITIONS OF STRATEGIC PLANNING TERMS

Values

Values are the principles, standards or qualities which represent the belief systems and convictions of individuals and/or the organisations which employ them. The values of an organisation may or may not be stated openly. Scouting is a values-based Movement and the values are expressed in the fundamental principles set out in the Constitution of WOSM. The fundamental principles are normally summarised in three categories:

'Duty to God' – a person's relationship with the spiritual values of life, the fundamental belief in a force above mankind.

'Duty to others' – person's relationship with, and responsibility within, society in the broadest sense of the term: his or her family, local community, country and the world at large, as well as respect for others and the natural world.

'Duty to self' – a person's responsibility to develop his or her own potential, to the best of that person's ability.

The values of Scouting, expressed in the principles, are not abstract concepts; they permeate all aspects of Scouting and guide the life of its members. For young people, Scouting's values are expressed in the Promise and Law which are a fundamental component of the Scout Method.

Mission

A mission statement describes the organisation's purpose of existence. An effective mission statement answers three questions:

- What is the business of the organisation?
- Whom is the organisation in business for?
- How does the organisation fulfil its function?

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

This is achieved by:

- *involving them through their formative years in a non-formal educational process*
- *using a specific method that makes each individual the principal agent in his or her development as a self-reliant, supportive, responsible and committed person*
- *assisting them to establish a value system based upon spiritual, social, and personal principles as expressed in the Promise and Law."*

Vision

The vision of an organisation is developed from the fundamental values and principles as expressed in the mission statement. The vision describes the desired, preferred future state of an organisation. It answers the question *"What do we really want to be like?"*, and provides an opportunity to create a future that might not otherwise exist.

In Scouting, following the adoption of the Mission in 1999 during the 35th World Scout Conference in Durban, the following vision for WOSM was developed and adopted three years later at the World Scout Conference in Thessaloniki. This vision sets out a picture of what we want to achieve in the future and to visualise the Scout Movement we want for the 21st century.

The vision:

"As a global Movement, making a real contribution to creating a better world...

*"**We see Scouting** as entering its second century as an **influential, value-based, educational Movement** focussed on achieving its mission, involving young people working together to develop their full potential, supported by adults who are willing and able to carry out their educational role."*

*"**We see Scouting** world-wide as **attracting and retaining more and more young people** (especially adolescents) of both genders and coming from broader segments of society."*

*"We see Scouting as **attractive to adults, women and men** in all cultures – a Movement through which they can make a significant contribution to society by working with young people."*

*"We see Scouting as a **dynamic, innovative Movement** with adequate resources, simple structures and democratic decision-making processes where organisation, management and communication are effective at all levels."*

The bold words in the WOSM's vision statements above reflect the main thrust that will propel WOSM into the 21st century.

NSOs can also develop their own vision statements, which will specifically describe their desired future state. See handout topic 2 *'The visioning process'* on a guide to developing a powerful vision statement.

Situation Analysis (SWOT)

'SWOT analysis' is a commonly used management tool for analysing an organisation's overall situation. SWOT stands for '**s**trengths', '**w**eakness', '**o**pportunities' and '**t**hreats'. This approach attempts to balance the internal strengths and weaknesses of the organisation with the opportunities and threats presented by the external environment. The premise of the approach is that the major issues facing an organisation can be determined through a thorough analysis of each of the four elements. Strategies and action plans can then be formulated to address these issues. See handout 1.5 for a detailed explanation of the SWOT analysis technique.

Strategic Priorities

Strategic priorities are broad statements that define the areas of work needed to bridge the gap between the present and the preferred future states of the organisation. Each strategic priority may have one or several objectives.

Here is an example from the Strategy for Scouting.

Strategic Priority 5 is *'Volunteers in Scouting - developing new approaches to broaden the base of adult support'*. Here the broad area of work is defined '*volunteers in Scouting'* and a focus for this area of work is also clearly defined *'developing new approaches to broaden the base of adult support'.*

Objectives

Objectives are statements which clearly define the outcomes required to achieve the desired results e.g. those set out in the strategic priority. Objectives should be stated in such a way that the outcomes can be clearly measured at a specific point in time. They should include both quantitative (how much?) and qualitative (how well?) aspects.

Objectives therefore need to be written so that they are: **s**pecific, **m**easurable, **a**chievable, **r**ealistic and within a given **t**ime-frame (SMART).

Here are some of the objectives that have been set for *'Strategic Priority 5: Volunteers in Scouting'*

By the year 2005, WOSM will have:

- produced a working paper on re-defining the meaning of 'volunteerism' in Scouting.
- conducted an annual census on the implementation of the World Adult Resources Policy (WARP).
- undertaken a qualitative study to measure the effectiveness of WARP in selected regions and its impact on the new group of volunteers.

Action plans

Action plans are the written list of concrete steps needed to achieve each objective. They help to translate ideas into action to make things happen. They define what exactly needs to be done, who is responsible, how is the task done and the resources required to carry out the task.

What: What are the activities to be done to achieve the objectives? Activities should be clearly described and listed in the proper sequential order.

When: The starting and completion dates (timelines) for all the activities, and in some cases, for each task, need to be clearly set out. In establishing realistic timelines, it may be advisable to start at the completion date for the activity and work backwards towards the present.

How: This identifies how the task is going to be translated into the specific work plan for different individuals or teams. Tasks are the smaller jobs which need to be carried out to accomplish the activity.

Who: This identifies the person, designation, or name of the team or individual responsible for each task. The persons identified as responsible do not necessarily have to do the task themselves,but are accountable for ensuring that it gets done.

With what: This represents the resources required in terms of finances, materials, facilities and equipment. It is highly desirable to determine the resources needed for each task.

Other related definitions (Adapted from Basic Planning Kit, WOSM, 1987.)

Strategic planning

Includes the reviewing of the goals of the organisation (What is its Mission?), analysing the present and future situation of the organisation, visualising the future and developing a limited number of priorities.

Tactical planning

Includes setting of specific, measurable objectives and determining the list of activities to be conducted within a short term period.

2.2 FLOWCHART OF THE STRATEGIC PLANNING PROCESS

The purpose of the flowchart is to give a quick overview of the SP process showing the sequential steps and their inter-relationships. It provides, at a glance, the various steps involved in the entire process.

CLARIFY VALUES → What we stand for? (What) — **STEP 1**
→ Scouting Principles

UNDERSTANDING THE MISSION → Purpose of Scouting (Why) — **STEP 2**

ENVISIONING → What do we really want? •desirable future state — **STEP 3**

Strategic level

SITUATION ANALYSIS → Where are we now? — **STEP 4**

Phase 1 Planning

STRATEGIC PRIORITIES → Focus / Emphasis " Gap " Now vs Future — **STEP 5**

OBJECTIVES → What to do? (How) — **STEP 6**

Operational level

ACTION PLAN → Concrete Steps — **STEP 7**

Phase 2 Implementation

MONITOR / REVIEW → " Follow-up"/ Revise

Phase 3 Evaluation & Renewal

EVALUATE → " Measure impact "

RENEW / REINVENT → "Innovate"

2.3   PHASES

There are 3 phases in the SP process shown in the flowchart 2.2; planning, implementation and evaluation. This section describes the steps of each phase, their purpose and the inter-relationships between the steps. When reading the text, it will be helpful to refer to the flowchart.

Phase 1: Planning

There are 7 steps **to this process.**

Steps 1 to 5: involve planning at a strategic level; emphasising developing long term strategic priorities for the future direction of the organisation (long term focus).

Steps 6 to 7: involve planning at an operational level; emphasising developing concrete plans to achieve the strategic priorities identified (short term focus).

Planning at strategic level (steps 1 to 5)

The **first step** in planning the future is to re-examine our values and belief systems. These are how we make sense of issues and attach meaning to them; and they influence almost every aspect of our lives. In doing so, we are reinforcing and revalidating the values and belief systems we live by. Basically, they answer the fundamental question of *"What is important to us?"* Our values provide us with a sense of direction and guidance for our day to day behaviour; they influence our feeling and actions on what is right and wrong, important and unimportant.

In Scouting, the fundamental principles represent the core values and these do not change over time. 'Duty to God', 'Duty to Others' and 'Duty to Self' are enshrined in our Scout Promise and they are the bedrock of our uniqueness. By re-examining them, we are reinforcing and revalidating their relevance to the present context.

The **second step** is to analyse the mission statement so that we can have a better understanding of what we stand for and why. The mission statement is based on the core values of Scouting and reflects the purpose of our existence, therefore providing the guiding direction for developing the future vision. In Scouting, our main purpose is to develop young people holistically; to their full social, physical, emotional, intellectually and spiritual potential, so that they can play a more constructive role in society. By being aware of our mission and understanding what it contains, we are in a better position to understand our responsibilities and the challenges ahead.

The **third step** is the envisioning part, i.e. *"What do we really want to be like?"* in the foreseeable future. The vision is a picture of the desired, preferred future we seek to create. The vision is created from the fundamental core values (Principles of Scouting) and the purpose (Mission of Scouting). A powerful vision statement should be achievable, challenging, clear and easy to understand, describing a preferred and meaningful future state that inspires, excites and motivates people, even in difficult times. Handout topic 2 provides a guide, and methods which can be used, to create a vision statement.
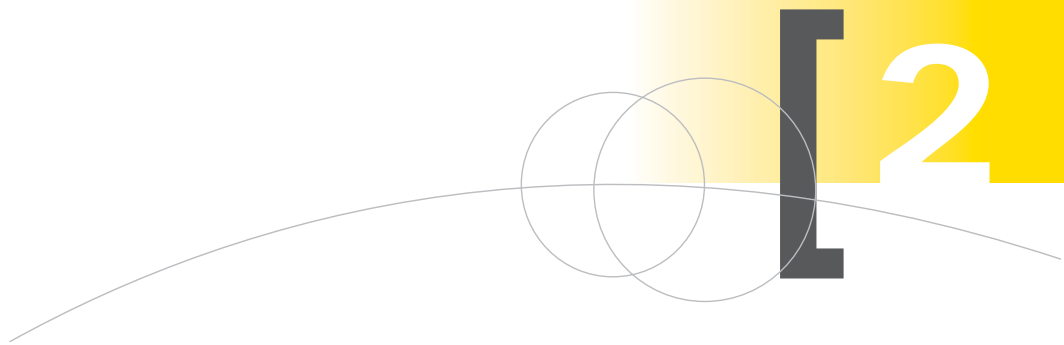
Once the shared vision has been drafted, the **fourth step** is to do a situational analysis of the organisation in terms of its strength, weakness, opportunities and threats (SWOT). (See handout topic 1.5 for a thorough explanation of the SWOT analysis). This technique enables us to examine and analyse our current situation and ask exactly "*where are we now?*" A SWOT analysis can be applied to the whole organisation or it can be used to explore one element of the organisational sub-system, say, financial resources. In the table below there is an example of a SWOT analysis for financial resources.

Table 1: SWOT Analysis - Financial Resources

NOW		FUTURE	
Strengths (S)	**Weaknesses (W)**	**Opportunities (O)**	**Threats (T)**
• Annual governmental grant • Good income from sale of Scout supplies	• Too much reliance on government funding • No clear guidelines or procedures on authorising expenditure which may lead to financial abuse	• Corporate sponsorship	• Political instability that might result in a new government not supportive of Scouting

The main aim of the SWOT analysis is to identify and capitalise on the strengths, be aware of the weaknesses, explore the opportunities and reduce the threats facing the organisation.

Planning at operational level (5 to 7 steps)

Planning at operational level, also called the tactical planning (Basic planning kit, WOSM, 1987), begins once the strategic priorities have been identified. It overlaps partly with strategic level planning, where the identification of the strategic priorities marks the end of planning at strategic level.

Having completed the SWOT analysis, the **fifth step** focuses on identifying the strategic directions the organisation wants to take in moving towards the vision. The organisation may have identified several areas on which it wants to focus. However, this may not be possible given the limited resources. So, once the strategic priorities are identified, decisions may need to be taken on which priorities should be a focus, based on their importance and urgency.

For example, WOSM has developed seven strategic priorities out of which 3 priorities, namely Youth Involvement, Volunteers in Scouting and Scouting's Profile, were selected by NSOs at the World Conference in 2002 as the key strategic priorities on which WOSM should focus during the triennium 2002-2005.

Hence, strategic priories are broad statements of intentions needed to bridge the gap between the present and the preferred future states of the organisation and they often include an action-oriented verb e.g. SP6: An Organisation for the 21st Century – *becoming* flexible, lean, innovative and participatory, or SP5: Volunteers in Scouting – *developing* new approaches to broaden the base of adult support, or SP7: Scouting's Profile – *strengthening* communications, partnerships and resources".

Step six involves setting objectives. Each strategic priority may have one or more separate objectives. Objectives are the basis for action and provide a guideline on the allocation of organisational resources. A sound objective should be "SMART" that is, **s**pecific, **m**easurable, **a**ttainable, **r**ealistic and **t**ime-bound. Here is an example of a SMART objective – 'to increase Cub-Scout membership by 15 % by Dec 2005'. Generally, objectives should also be result-orientated and challenging. Another way of ensuring objectives are measurable is to see if they satisfy the following criteria: quantity (how many?), time (how soon?), quality (how well?) and cost (how much?).

The **final step (seven)** is the action plan. This sets out how to achieve the identified objectives and each objective may have several concrete steps. The action plan therefore defines the activities; the task (what?), the completion date (when?), the people responsible for the task (who?), and the resources required (with what?) to attain the objectives.

The following chart provides an example of an action plan.

Table 2: Sample Action Plan

STRATEGIC PRIORITY: Involving young people in the decision-making process for their development so that they can play a constructive role in society.			
Objective 1	**What (Task) & by When**	**Who**	**Resources**
To review the existing youth programme to be in line with the relevant WOSM policies on youth involvement within 2 years (8 quarters Q1 - Q8).	1) Form a task force at national level to review the programme. Membership to include representatives of young people. Q1	Chief Commissioner (CC)	Relevant policies, literature, expertise, etc.
	2) Organise a National Youth Forum by end of Q3 to get feedback on ways and means of involving young people in decision-making process.	National Programme Commissioner (NPC)	Funds, expertise, etc.
	3) Review proposals and make concrete suggestions for changes to the progamme. Q5	Task Force	Funds, expertise, etc.
	4) Adoption of the revised programme by the National Council. Q6	CC & NPC	
	5) Organise seminars at local levels by to explain and disseminate the revised programme. Q7, Q8	NPC & local Commissioners	Funds, printed literature, expertise, etc.
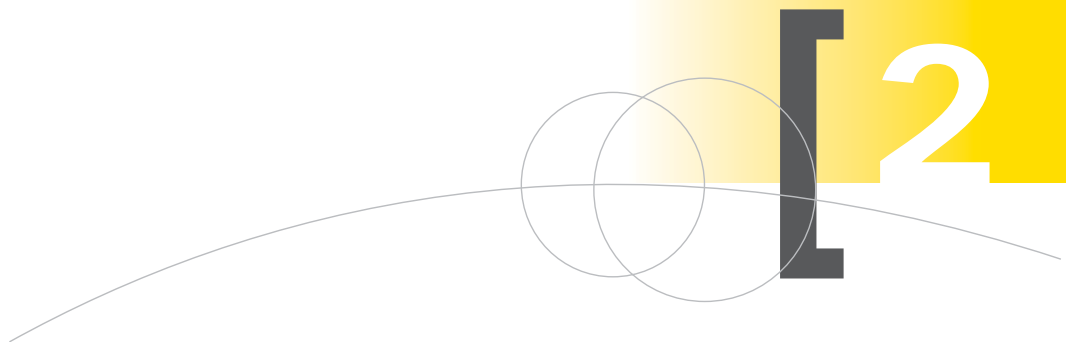
Phase 2: Implementation

Once the vision has been agreed upon and the action plan completed, it is very important to get the commitment of those who have not been directly involved in the envisioning and the planning processes. Gaining commitment at all levels can be undertaken through communication and education. The first target group is top management, who must be the champions of change. They must be seen to support and take the lead in realising the developed strategic plan by ensuring that the necessary resources are provided to support its implementation.

Then, the vision and the strategic plan must be communicated to members at all levels in the organisation. This can be done at the drafting stage and, if feedback is requested, this will allow the plan to be reworked, if required. Asking for feedback helps people to have ownership of the plan; it helps them to be committed to achieving the outcomes which should encourage them to take action. The vision and plan, or draft plan, should be shared at all levels in the organisation, e.g. by printing posters, brochures, etc. to inform people of the vision, or by introducing it and discussing it at meetings.

The 'systems thinking' approach (see handout topic 1) is an important approach to consider when implementing the plan. This encourages us to look at the big picture and see how change in one place affects the organisation and the people and this approach suggests that the impact of this change should be analysed. One method of analysing it is the force-field diagram (see handout topic 3.4). This technique requires all the forces that are helping the implementation to be identified, and then all the forces that are restraining the implementation are identified. When deciding on the action to be taken, it should be remembered that it is always easier to eliminate or reduce the restraining forces than to increase the driving forces.

Depending on the complexity of the plan, the implementation process can be divided into several stages over a given period of time. For major changes which may have serious consequences, it is useful to consider implementing a pilot scheme on a smaller scale. This enables all the "glitches" to be rectified before the full implementation is undertaken. For example, when introducing a computerised registration system nationally, it may be desirable to try out the system in one or two districts in advance.

It is also important to monitor the progress of the implementation regularly, e.g. on a quarterly basis, to ensure that the progress is on track and moving in the desired direction. The following questions can be used to check progress:

1. Do people assigned to the activity / task understand their roles and responsibilities?
2. Which activities / tasks that should have been completed are not and if so, why?
3. Which activity / task is behind schedule and if so, why?
4. Are there activities and tasks that will be critical to the success of the plan? If so, list them, and make sure that they get priority in terms of financial and human resources.

5. Are there any major unforeseen circumstances affecting the effective implementation of the plan? If so, identify them, assess them and decide how to overcome them.

If required, the plan and action steps should be modified to respond to the unforeseen circumstances and changing conditions in the environment which are causing difficulties. It is important to ensure that the new plan is in alignment with the vision, strategic priorities and objectives that were agreed upon initially. The revised plan must still focus on achieving the mission of the organisation.

Phase 3: Evaluation and Renewal

For an evaluation to be truly effective, it needs to be considered during the planning stage. Consideration should be given to the questions *"What do we want to evaluate?"* and *"How are we going to evaluate?"*. Although the evaluation planning process starts early, the evaluation itself cannot be undertaken until some activities have been completed.

Here are some key questions to ask in the evaluation process:

a. What are the overall objectives of the strategic plan?
b. What are the required standards, measurement indices and how are these measured?
c. What benefit, effect or change is anticipated or expected?
d. How will these benefits, effects or changes contribute to the overall performance of the organisation as a whole?
e. How will the actual benefits, effects or changes be identified and measured?

The evaluation should be an ongoing process, carried out at regular intervals e.g. quarterly. Progress can then be monitored and unforeseen or unplanned issues identified. These can crop up from time to time hampering the achievements of the goals and objectives. Where and when necessary, changes should be made to the objectives of each strategic priority. The strategic plan is therefore revised and modified to reflect the changing circumstances. This enables the strategy to respond to changes in the external and internal environments and remain relevant to the needs of the organisation.

Models, which can be used as a reference in the evaluation process are included in handout topic 4.
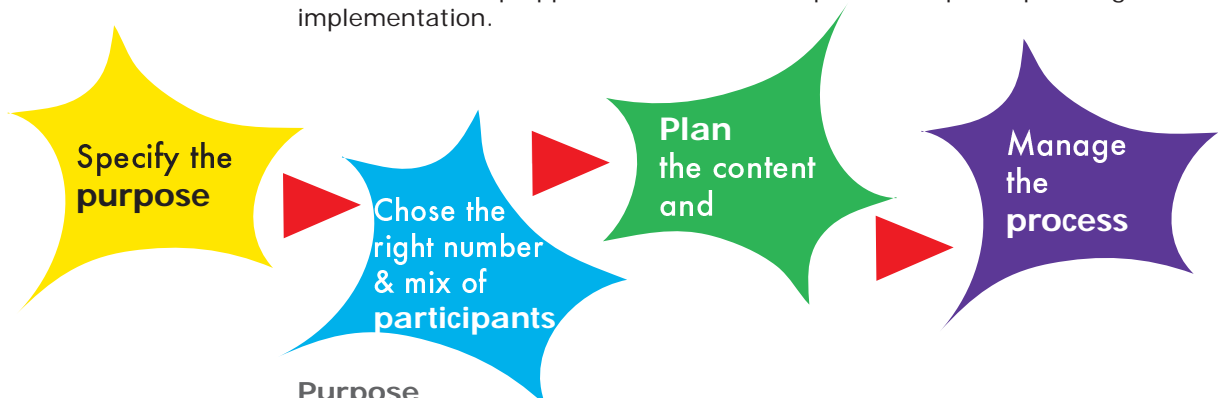
In the next section, methods of building commitment and ways to minimise resistance to change are set out.

2.4   THE COMMITMENT PROCESS

Recognising that successful implementation of the plan depends upon the degree with which people are willing to see it through, this section provides a guide on how to build the commitment of all the people involved in the process; from the designing stage, right up to the implementation and evaluation stage. The sources of resistance and strategies for minimising or overcoming resistance to change are also provided as a reference.

Here are 4 topics that need to be considered to gain maximum commitment from the members attending a strategic planning workshop, or more generally the members of the organisation.

Use the 4 P's step approach. These are sequential steps for planning and implementation.

Specify the **purpose** ▶ Chose the right number & mix of **participants** ▶ **Plan** the content and ▶ Manage the **process**

Purpose

For the workshop, the first step is to clearly specify the purpose and intention of the overall plan, the level of commitment required and the process involved in organising the workshop. People have invested their time to be present and therefore it is crucial that the main purpose and intention are adequately spelled out so that they can prepare themselves for something meaningful and worth attending. The aim and objectives of the workshop should be explained and reflected in publicity material or in a circular. The bottom line is that people must understand the need to develop the strategic plan and the reasons for their involvement.

At a more general level, it is also important to specify the purpose of developing a strategy and outline what the strategy will achieve. This should be set out in the vision. It is critical that all members of the association are helped to see the need for change so that they will contribute to finding the solutions and carrying out the actions needed to achieve the changes.

Participants

For the workshop, based on the purpose, individuals with the appropriate degree of knowledge and experience should be invited. It is very important that we reach out to the right target audience. Individuals at all levels of the association, grassroots, districts and national, should be represented since they are part of the stakeholders of the organisation. This would increase the probability of securing ownership. Non-uniform

members, if any, serving district and national councils should also be invited. Sometimes it may be desirable to invite people from totally different backgrounds and experiences to inject fresh perspectives.

At a general level, it is important that all members of an organisation are identified as 'participants' in the process and involved in an appropriate way. This will include young people and non-uniform members.

Plan

It is important to involve key people during the planning stage. Who are these people? They include the national council members, key functional and operational commissioners and even grassroots leaders. Research has repeatedly demonstrated the people are more likely to go along with the decisions when they are involved in the formulation (Shaw, 1976). A common planning error is inviting too many people in the hope of obtaining inputs from as many people as possible (Whetten and Cameron, 1991). The result is superficial discussion of issues, since the pressure to hear from everyone precludes an in-depth discussion. Likewise, problem-solving ability is severely handicapped if the group size is small, especially when the task requires technical knowledge that none of the members' posses. The appropriate size depends on the purpose of the workshop. In general, the larger the group, the lower the percentage of participants involved in active discussion (Hackman and Vidmar, 1970).

Choose a venue that is convenient to most of the participants in terms of costs and distance. The venue should be reasonably conducive; complete with a plenary hall and several rooms or areas for small discussion groups and flipcharts, etc. should be provided to help the process along.

At a general level, it is important to find ways of involving people in the overall plan. This could be done by allowing them to express their views through questionnaires, discussion or focus groups or by setting up on-line discussions. When making plans to meet the needs of the association in the future, it is important that information is obtained from a wide range of people and all the key groups involved.

Process

The strategic planning workshop is not a training course, it is an opportunity for people to be involved in a process. Therefore, the main emphasis should be on getting the active participation of all participants, through small group discussions. Preferably, the chairman of the group should be rotated among the group members. It is also important that simple ground rules governing group discussions are established early in the process, such as, giving everyone the opportunity to air his or her views without fear of being criticised and discouraging premature evaluation of ideas. (See handout topic 5 on managing group process).

As Handy (1989) puts it, in his book "The Age of Unreason", those who change most readily are those who:

a)   take responsibility for themselves and for their future
b)   have a clear view of what they want that future to be,
   • want to make sure they get it, and
   • believe they can.
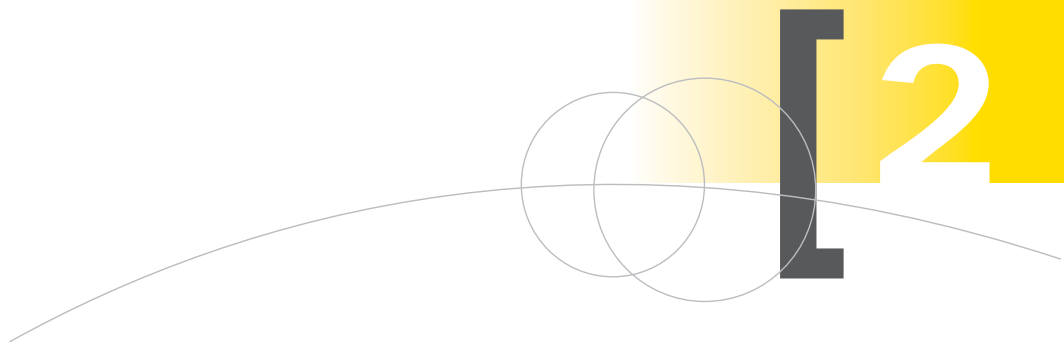
More generally, when developing a strategic plan it is important that:

- a clear process is established at the beginning – see flowchart 2.2, and clear lines of reporting to the association are set out.
- the process is owned and supported by top management and they receive regular progress reports.
- a small group of people are given responsibility to manage the process.
- communication and education at all levels are seen as a critical factor for success.

We now look at the potential sources of resistance to the planned change of the strategic plan.

2.5   MANAGING RESISTANCE TO CHANGE

It is highly probable that the strategic plan will affect the status quo of the organisation in one way or another. New systems may be developed and / or the organisation restructured to support the plan. This may require changes to the culture of the organisation, which may affect both the volunteers and the professionals.

Why do people resist change in the first place?

Kotter and Schlesinger (1979) identified four main reasons as follows:

1. Parochial self-interest

The desire not to lose something of value, which may be in the form of status, power, material benefits, comfort, familiar routines, political advantage and informal networks.

2. Misunderstanding and lack of trust

This is usually due to insufficient time and effort put in to build the relationships and /or the proposed changes have not been adequately explained and justified.

3. Low tolerance for change

Different people have different levels of tolerance to change. To some, change disrupts their frame of reference, and however minor it is, can be viewed as a crisis. Others may spend an inordinate amount of energy to control and adapt to the new environments and others may automatically resist anything they see as requiring conformity to someone's rules or expectations.

### 4. Different assessments of the need for the change

Possibly less emotional than the other reasons, resistance arises here because people genuinely fail to see the benefits, or focus on the costs, not only to them, but also for the organisation as a whole.

Next, we examine the strategies, which can be used to minimise or overcome resistance to change.

Table 3: Strategies for dealing with resistance to change
(Kotter and Schlesinger, 1979)

Approaches	When to use	Advantages	Disadvantages
Education and communication	When there is a lack of information or inaccurate information and analysis.	Once persuaded, people will often help implement the change.	Can be time-consuming if many people are involved.
Participation and involvement	When the initiators do not have all the information they need to design the change and others have considerable power to resist.	People who participate will be committed to implementing the change and any relevant informa-tion they have will be integrated into the plan.	Can be time-consuming if participators design an inappropriate change.
Facilitation and support	When people are resisting because of adjustment problems.	No other approach works as well with adjustment problems.	Can be time-consuming.
Negotiation and agreement	When some people or groups have considerable power to resist the change.	Sometimes it is a relatively easy way to avoid major resistance.	Can be too expensive if it alerts others to negotiate for compliance.
Manipulation and cooption	When other tactics will not work or are too expensive.	Can be a relatively quick and inexpensive solution to resist problems.	Can lead to future probems if people feel manipulated.
Explicit and implicit coercion	When speed is essential and the change initiators possess considerable power.	It is fast and can overcome any kind of resistance.	Can be risky if it leaves people angry with the initiators and the change.

2
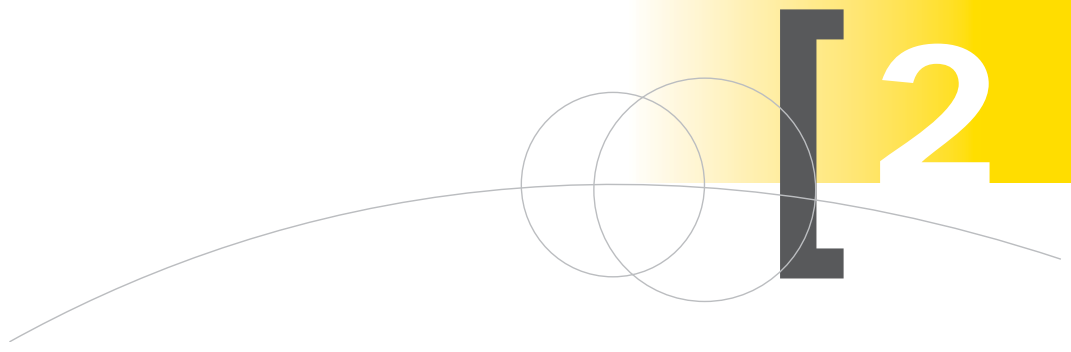
Usually these techniques can be used in combination. The choice in a given situation is dependent on the likely reaction of those involved and on the long-term implications of implementing the plan or solving the immediate problems.

The best way to overcome or minimise the resistance is through education and communication (Kotter and Schlesinger, 1979). People by nature are rational. If policies are clearly explained, they will accept the need for change when the benefits that come with the change are communicated. Likewise, through participation and involvement, people will take ownership of the plan and make it happen, for they are part of the process.

Knowing very well that it may not be possible to involve everyone in the workshop/meetings, the strategic plan must be communicated to all stakeholders, commissioners and leaders at all levels. Disseminate the strategic plan promptly and explain to those not involved in the development of the plan the need and purpose of the strategic plan. Several briefings will have to be scheduled to share and explain this plan. Once people understand the rationale behind the plan, they will be more receptive to the changes required and this will help to eliminate or minimise both the explicit and implicit resistance.

2

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A Modular Workshop on Strategic Planning

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3

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A Modular Workshop on Strategic Planning

This section provides an outline of a workshop on strategic planning based on a modular format. NSOs can use the suggested outline to plan a workshop to meet their particular needs and circumstances. There are 6 modules and each module is designed to achieve specific objectives. The module topics and suggested approach are applicable for use in workshops at either national or local level.

Aim

The aim of the workshop is to help NSOs develop a long range strategic plan. In the 21st century, organisations need to know what they want to achieve, be focussed, be sensitive to the changing needs of society and be able to respond quickly and effectively to changes in their environment.

Topics

The topics covered in the modules are as follows:

Module 1: (4 hrs)   The strategic planning process, systems thinking, WOSM's Mission Statement and the Strategy for Scouting

Module 2: (4 hrs)   Drafting a vision statement for an organisation

Module 3: (4 hrs)   Review of the current situation and SWOT analysis

Module 4: (4 hrs)   Developing strategic priorities

Module 5: (4 hrs)   Developing objectives

Module 6: (8 hrs)   Developing an action plan

Methodology

The primary methods used build on the experience and active involvement of the participants. The methods used include plenary presentations and discusssions and group discussions.

Participants

Key leaders and commissioners at all levels of the association should be represented and participate in all the modules. This will build commitment and ownership of the process and ultimately they will have ownership of the strategic plan.

The number of participants will vary depending on the resources available in the association. Ideally, the number should be limited to 40 for effective participation and discussion. The outline of the workshop has been prepared on the basis of 32 participants, who would form 4 groups of 8 for group discussion work.

Duration

Each module can be organised over a half day period with the exception of module 6, which is scheduled for one day.

Venue

The venue should be reasonably comfortable and a have a plenary hall/ area and several rooms or areas for small discussion groups.

3

3.1 MODULE 1 (4 HRS) - THE STRATEGIC PLANNING PROCESS, SYSTEMS THINKING, WOSM'S MISSION STATEMENT AND THE STRATEGY FOR SCOUTING

Objectives: The objectives of the module are to:

- explain the strategic planning process based on the flow chart in 2.2 and the approach to systems thinking,
- explain the core values of Scouting as reflected in the principles of Scouting,
- analyse WOSM's Mission statement for a clearer understanding of its purpose,
- provide an update on the Strategy for Scouting and share the content of the strategic priorities.

Methodology: Plenary input and discussion

Topic 1 – The strategic planning process (30 mins)

1. Explain strategic planning and the terms associated with strategic planning – see SPK chapter 2.1.
2. Explain the steps of the flow chart and sequential relationships of each process – see SPK chapter 2.2/2.3.

Topic 2 – Systems thinking (30 mins)

1. Explain the concepts of systems thinking – see handout topics 1.1 – 1.4.

Topic 3 – WOSM's Mission Statement (1 hour)

1. Explain the principles of Scouting – see The Essential Characteristics of Scouting (WOSM 1998)
2. Explain the elements of the Mission Statement – see Understanding the Mission Statement and Achieving the Mission of Scouting. (WOSM, 1999, 2000)
3. Discuss the elements of the Mission Statement to check the participants' understanding.

Topic 4 – The Strategy for Scouting and the strategic priorities (2 hours)

1. Briefly explain the historical development of the Strategy for Scouting since 1988 – see A Strategy for Scouting, booklet and video clip 1. (WOSM 2003)
2. Explain the process to develop the Strategy for Scouting – see A Strategy for Scouting, booklet and SPK chapter 1.
3. Explain the framework and content of the strategy, including the content of the seven strategic priorities – see A Strategy for Scouting, booklet and video clips 2-4 and SPK chapter 1.

3.2   MODULE 2 (4 HRS) - DRAFTING A VISION STATEMENT FOR AN ORGANISATION

Objectives: The objectives of the module are to:
* draw a picture of the current state of the association,
* describe the future desired state of the association,
* develop a vision statement for the association.

Methodology: Plenary input and discussion and group exercises

Topic 1 – What is a vision? (15 mins)

1. Explain that the purpose of creating a vision is to set out how the association will look in the future, which can then be used as a motivating force for change.

Topic 2 – Imagining the current and future states of the association (2 hours)

1. In small groups (6-8 people), ask each group to draw a picture that reflects the current state of association, using images, symbols or animals. The drawings should then be presented to the whole workshop, giving a more detailed explanation of what the picture represents and the meaning of symbols, elements, colours etc. used. The pictures should be displayed. (45 min)

2. Each individual is then asked to describe, in written format, his/her picture of the association in the future e.g. in five years time – see worksheet 1. (10 mins)

3. In groups the participants should share this information, discuss the similarities and differences and generate a list of common themes for their group – see worksheet 2. (20 mins)

4. Each group then draws a picture of what the NSO will look like in the future (e.g. in 5 years time) based on the outputs of worksheets 1 & 2. The results should again be explained in plenary. (45 mins)

Topic 3 – Drafting the vision statement (1 hr 45 mins)

1. Each group is asked to draft a vision statement for the association – see worksheet 3. This should be based on the common themes which have emerged from the drawings. The guidelines on a powerful vision statement (see handout topic 2) and a copy of WOSM's vision statement should be available as resources. The draft vision statements should be shared in plenary, for comments by the participants. (30 mins)

2. To produce one vision statement it may be necessary to form a small task force (2 from each group) to review all the draft vision statements which were presented, identify the common themes, redraft the text and come out with a proposed vision statement. (30 mins)

3. The task group should then present the redrafted vision statement in plenary. The participants should be given the opportunity to make changes again, based on the feedback before endorsement. (30 mins)

4. Participants should them be informed that the newly endorsed, drafted vision statement will be used by them in the next stage of the process i.e. the identification of strategic priorities and objectives. The proposed vision statement will also need to be ratified by the appropriate committee. (15 mins)

3.3 MODULE 3 (4 HRS) - REVIEW OF THE CURRENT SITUATION AND SWOT ANALYSIS

Objectives: The objectives of the module are to:
- provide a quick overview of the current status of the association,
- share relevant information on the latest performance of the association in defined areas,
- identify the current strengths, weaknesses, plus future opportunities and threats to the association,
- examine the key challenges to the association.

Methodology: Plenary discussion and group exercises

Topic 1 - Overview of the current status of the association (1 hour)

This session should be handled by a senior member of the organisation, preferably the Chief Commissioner or the Chief Executive and be supported by relevant documentation e.g. annual reports, relevant statistics and the constitution.

1. Inform participants of the various issues facing the association.
2. Share relevant reports and findings.
3. Show relevant statistics to support the analysis and describe the present state of affairs.
4. Give out fact sheets on membership figures, the organisational chart, financial figures or any other relevant material which will aid the analysis.

Topic 2 - The 'What', 'Why' and 'How' of SWOT analysis (30 mins)

1. Explain the 'what' and 'why' of SWOT analysis – see handout topic 1.5.
2. Identify all the elements of the analysis and explain how to complete it.

Topic 3 – Undertake a SWOT analysis for the association (2.5 hours)

It is important that the participants understand that the results of the analysis will be the reference material which will assist them in determining the strategic priorities in the next module.

1. Divide the participants into 4 groups. Each group is asked to identify a particular area of the association e.g. youth programme, finance, human resource management, communications etc. and complete a SWOT analysis on this topic. Alternatively each group can be assigned to analyse one aspect of the SWOT analysis on the range of topics identified. A sample form for the analysis is provided in worksheet 4. (1.5 hours)
2. Each group is then asked to present its analysis in plenary for comments and discussion, and amendments can be made. The final SWOT analysis consists of all the lists once the amendments have been incorporated. (1 hour)

3.4 MODULE 4 (4 HRS) - DEVELOPING STRATEGIC PRIORITIES

Objectives: The objectives of the module are to:
- identify the key areas to focus on for the strategic plan,
- develop strategic priorities based on the key areas.

Methodology: Plenary discussion and a group exercise

Topic 1 — Strategic areas and strategic priorities (15 mins)

1. Explain the purpose of identifying key strategic areas and more focussed strategic priorities – see Basic Planning Kit (WOSM 1987) and A Strategy for Scouting (WOSM 2003) and SPK chapter 2.
2. Stress the need for prioritising efforts so that maximum impact is obtained from the work undertaken.
3. Identify where developing strategic priorities comes in the strategic planning process – see flowchart on page 21.

Topic 2 — Identify and prioritise the strategic areas (3.5 hours)

1. Based on the work and discussion so far ask each group to explore and identify key strategic areas which need to be a focus for the association to realise the vision. (30 mins)
2. The results should be presented in plenary and following comments and discussion, strategic areas should be selected. (1 hour)
3. The strategic areas should then be focussed more clearly as strategic priorities. This can be undertaken in groups, using the boxes provided in worksheet 5. (30 mins)
4. The text of each strategic priority should be presented in plenary for comment and discussion, and, if necessary, changes made. (1 hour)
5. The final text can be reviewed in plenary and a final draft produced. (30 mins)

Topic 3 — Review the strategic planning process (15 mins)

1. Using the strategic planning flow chart on page 19, the next step in the process can be explained i.e. to develop objectives for each of the strategic priorities.

3.5 MODULE 5 (4 HRS) - DEVELOPING OBJECTIVES

Objectives: The objective of the module is to:

• formulate SMART objectives for each strategic priority.

Methodology: Plenary discussion and a group exercise

Topic 1 — How to set good objectives (15 mins)

1. Explain that good objectives are "SMART" i.e. **s**pecific, **m**easurable, **a**chievable, **r**ealistic, **t**ime-bound - see page SPK chapter 2 and Basic Planning Kit (WOSM 1988).

Topic 2 — Identifying objectives for each strategic priority (3.5 hours)

To undertake more work on each of the strategic priorities, they should be divided up between the members of the group. It may be useful for the participants to work in their area of interest and expertise.

1. The strategic priorities are divided between the participants and objectives are developed for each topic. Draft charts are provided in worksheet 5 for this purpose. (2 hours)

2. When completed, the results should be presented in plenary for comment. Revisions, if necessary, can be done in plenary or in the small working groups. (1 hour)

3. The final sets of objectives for each strategic priority should be presented for endorsement. (30 mins)

Topic 3 — Review the strategic planning process (15 mins)

1. Using the strategic planning flow chart on page 19, the next step in the process can be explained i.e. to develop the action plans to achieve the objectives that have been set for each of the strategic priorities. This can be one of the most demanding parts of the strategic planning process and a whole day has been allocated for this module.

3.6   MODULE 6 (8 HRS) - DEVELOPING AN ACTION PLAN

Objectives: The objectives of this module are to:
• list the activities and tasks required for each objective.
• identify the required resources.

Methodology: Plenary discussion and a group exercise

Topic 1 – The purpose of action planning (15 mins)
1. Explain the purpose of undertaking action planning – see Basic Planning Kit (WOSM 1987)
2. Explain the elements of the action plan work sheet – see SPK page 24

Topic 2 - Identify the activities and tasks required for each objective (7.5 hours)

The groups that developed the objectives for each strategic priority should now devote their time to come up with a detailed plan of the activities and tasks to be carried out to achieve the objective. Given the demanding nature of this exercise, a total of 7.5 hours is allocated for this process.

1. In groups the participants should complete the remaining boxes, as set out in worksheet 5. They need to identify **what** needs to be done – the activities and actions, **when** these should happen, **who** will take responsibility for making them happen and the **resources** that need to be allocated to achieve the desired results.

2. It will be necessary to review progress from time to time to allow for comments and identify overlap in closely related areas of work etc.

3. A final presentation should be made so that the overall action plan can be accepted by all the participants.

3

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4

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Worksheets

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4

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Worksheets

This section contains worksheets to support the various exercises set out in the modular workshop. The following worksheets are included :

4.1   Individual exercise on vision creation

4.2   Group exercise on vision creation

4.3   Drafting a vision statement

4.4   SWOT analysis

4.5   Developing an action plan

4.1 WORKSHEET 1 - INDIVIDUAL EXERCISE ON VISION CREATION

Describe the mental picture of your NSO in 5 years time.

The following questions can help you in developing that picture:

• What image do you have of the association in the future?

• What will distinguish the association from similar community organizations?

• What benefits can members and your local community expect from the association?

• How would you like people, especially non-Scouts, to describe your association?

4.2 WORKSHEET 2 - GROUP EXERCISE ON VISION CREATION

Share concepts, words and phrases for the vision statement.

Share the ideas which were developed by each individual. As a small group identify the key concepts which describe the preferred future of the association, from the individual contributions.

List the common concepts and themes below.

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4.3   WORKSHEET 3 - DRAFTING A VISION STATEMENT

Based on the key concepts, themes, words and phrases which have been identified; as a group, draft a vision statement for your NSO in 5 years from now; which describes it as different and better.

Record your vision statement below:

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4.4   WORKSHEET 4 - SWOT ANALYSIS

Here is a sample chart to complete a SWOT analysis for an association, focussing on a particular topic.

FOCUS:

CURRENT		FUTURE	
Strengths	Weaknesses	Opportunities	Threats

4.5   WORKSHEET 5 – DEVELOPING AND ACTION PLAN

Here is a sample chart which can be used to develop an action plan for each of the strategic priorities identified in the strategic plan.

STRATEGIC PRIORITY:			
	What (Task) and by When	**Who**	**Resources**
Objective 1			
Objective 2			
Objective 3			

STRATEGY
ACHIEVING OUR MISSION

STRATEGIC PRIORITY:			
	What (Task) and by When	**Who**	**Resources**
Objective 1			
Objective 2			
Objective 3			

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STRATEGY
ACHIEVING OUR MISSION

5

Strategy
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Handouts

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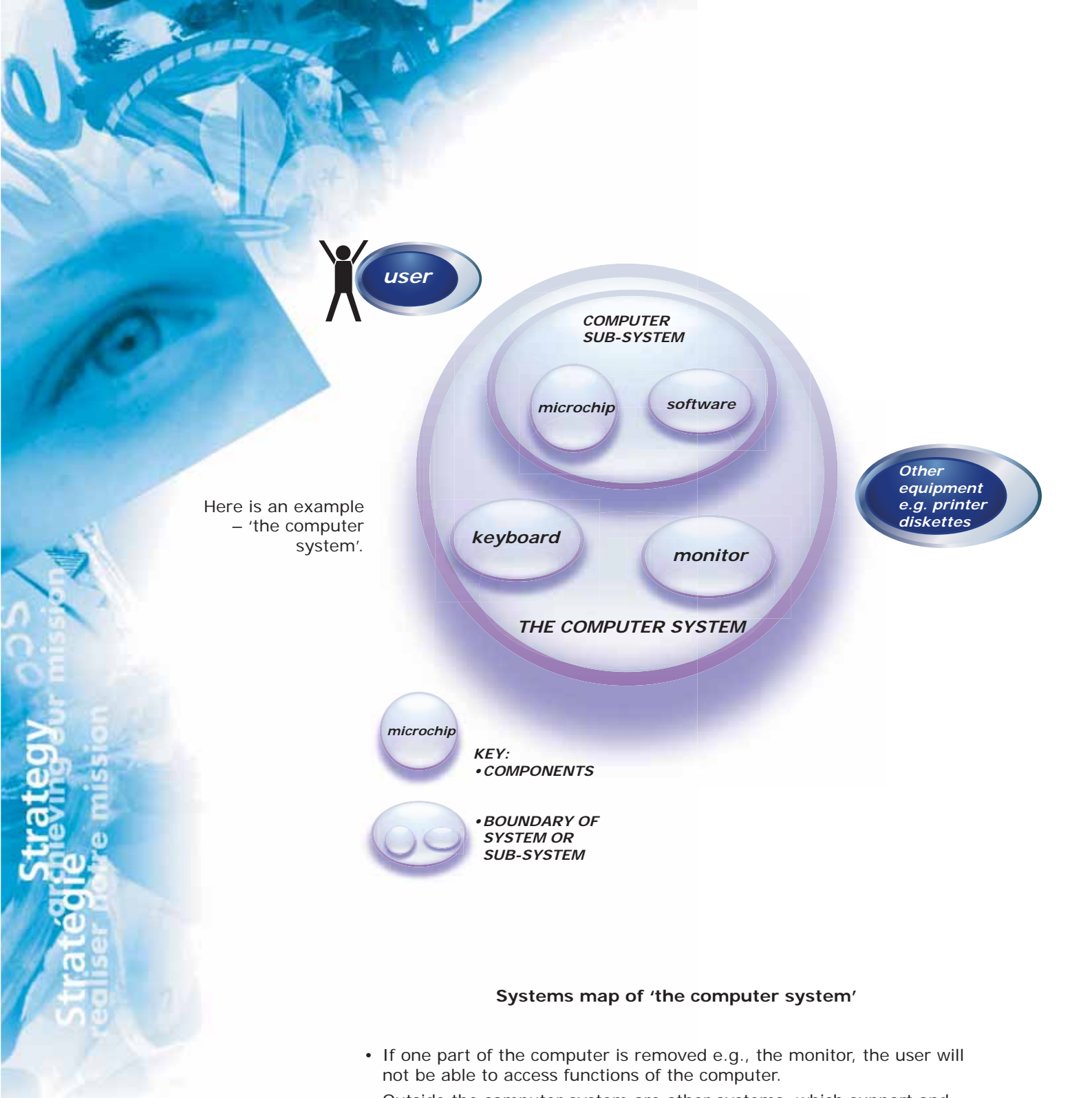
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Handouts

5.1   TOPIC 1: BASIC THEORY OF STRATEGIC PLANNING CONCEPTS
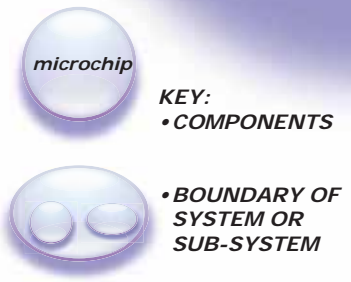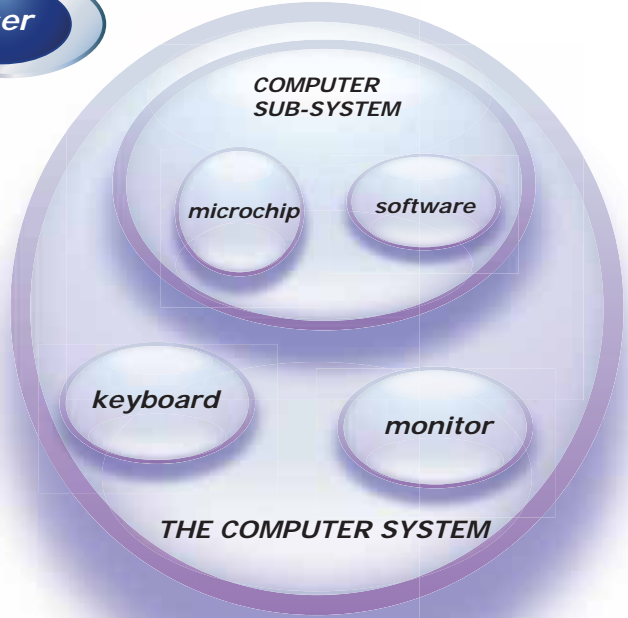
5.1.1 What is a 'system'?

A 'system' is an assembly of parts linked together in a pattern or organised form, in such a way that the behaviour of the system is changed or affected if any part is not present. This form of organised assembly of components does something of particular interest. (Open University, 1994). It is therefore a set of elements or parts that relates to one another in an organised way for the purposes of the achieving something.

Here is an example – 'the computer system'.

user

COMPUTER
SUB-SYSTEM

microchip

software

Other
equipment
e.g. printer
diskettes

keyboard

monitor

THE COMPUTER SYSTEM

microchip

KEY:
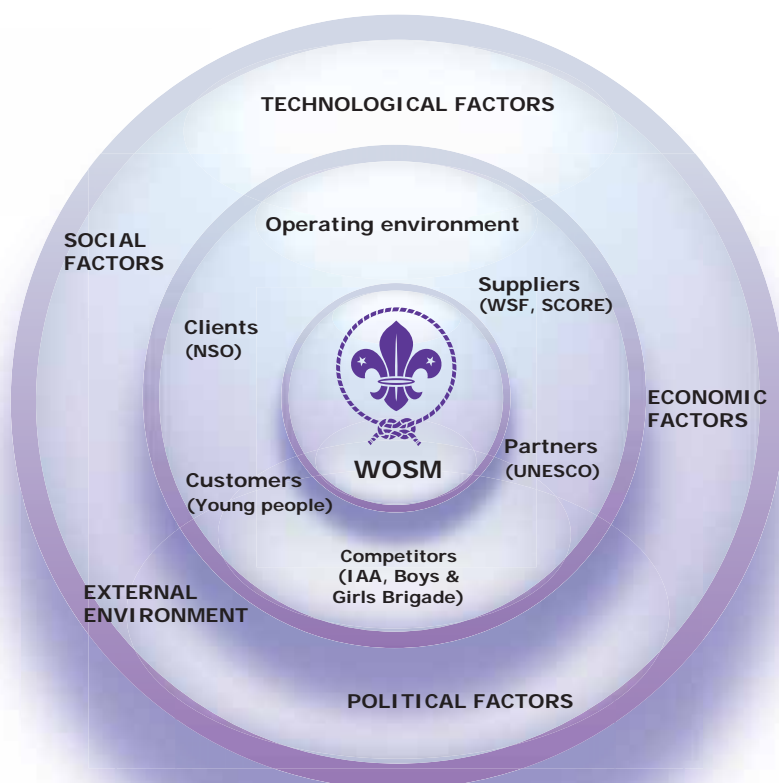• *COMPONENTS*

• *BOUNDARY OF*
  SYSTEM OR
  SUB-SYSTEM

Systems map of 'the computer system'

- If one part of the computer is removed e.g., the monitor, the user will not be able to access functions of the computer.
- Outside the computer system are other systems, which support and enhance the capability of the entire system as a whole.
- If the user is not sufficiently trained, he or she will not be able to optimise the full potential of the computer system.

5.1.2 Organisations as 'open and social systems'

From the perspective of an 'open system' the organisation is viewed, not as a formal structure or as an organic entity, but as a system of interdependent activities within and outside the organisation. Some of these activities are tightly connected, while others are loosely coupled (Scott, 1992). In other words, some activities and people are tightly controlled by red tape and procedures while in other activities there is flexibility and some people may have the autonomy to make decisions.

5

WOSM is an organisation that operates in an open system as shown below:

TECHNOLOGICAL FACTORS

Operating environment

SOCIAL FACTORS

Suppliers (WSF, SCORE)

Clients (NSO)

WOSM

ECONOMIC FACTORS

Partners (UNESCO)

Customers (Young people)

Competitors (IAA, Boys & Girls Brigade)

EXTERNAL ENVIRONMENT

POLITICAL FACTORS

A model of an organisation's environment

The factors in the external environment, namely, the social, technological, economic and the political factors affect WOSM's operations. Changes in any one of these factors will affect the operation of WOSM.

The operating environment of WOSM comprises among other things its customers, that is, the young people, **the clients** - NSOs, **partners** - UNESCO, Corporations, Kindred Organisations, etc, **competitors** - Youth Organisations, **suppliers** - World Scout Foundation, SCORE, etc. In the same way, any change in this environment will also have a bearing on the overall operation of WOSM.

Therefore, it is important to focus on the relationships between all elements within a system (i.e. the department, section, within an organisation). That is, how they work together as a whole. It is the relationships which help the organization to achieve its goals and objectives.

5.1.3 What is 'systems thinking'?

According to Senge (1990), 'systems thinking' is a framework for "seeing inter-relationships rather than linear cause-effect chains". This involves refocusing our minds to see the whole picture or situation, rather than seeing only the parts. It encourages us to view things from a 'big picture' perspective, that is, to think holistically about the whole scenario that may be affected by our actions. This is often described as systemic.

Take for example, the process of driving a car. If we are experienced drivers, we don't normally think about changing gear whilst driving. We respond systemically and unconsciously, as the outcomes are rather predictable. However if we are suddenly confronted with a significant change in the environment, such as a steep descent down a winding slope, then we have to think about the other factors coming into play such as the brakes, the horn so that we can respond to unforeseen circumstances.

This is a systemic approach as we are considering the effects of our actions on all parts of the system of which we are a part i.e. driving the car safely,

In short, a systemic approach is a form of critical thinking with the following benefits:
- It allows a clearer way to see, understand and assess what is happening in the organisation or in any system where the inter-relationships among the parts can be analysed to determine the multiple causes and effects.
- It provides the framework to think critically
- It makes complex problems easier to understand.

5.1.4 What is strategic planning?

Strategic planning is part of the study of strategic management concepts. This study of strategic management gained momentum after the Ford Foundation and the Carnegie Corporation sponsored research into the business school curriculum in the 1950's. Its popularity peaked with the contributions of Kenneth Andrews (1965) and Igor Ansof and their rational, analytical strategic planning models (1965). To date there is no universal definition of the concept (Certo and Peter (1990)).

One definition is that strategic management is a *'continuous interactive process'* aimed at keeping an organisation as a whole, appropriately matched to its environment. Let us examine this definition closer.

By a *'process'*, it means that we engage in a series of steps. And, by *'interactive'*, it simply indicates that the process of strategic management starts with the first step ends with the last step and then begins again with the first step. Therefore, the series of steps are repeated in a cyclical fashion.

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The last part of the definition highlights the need for adaptation with the constant changing environment; to ensure that organisations stay viable, relevant and remain competitive. Since organisations operate as an 'open system' and are continuously affected by these changes in their environment, we need to be aware of all environmental factors, which could have a direct and indirect impact on the functioning of the organisation.

Strategic planning is therefore a management tool to help an organisation perform better. It is defined by Allison and Kaye, 1997, in their book "Strategic Planning for Non-Profit Organisations" as '*a systematic process through which an organisation agrees on and builds commitment among key stakeholders, to prioritize areas which are essential to its mission and be responsive to the operating environment*'. It is a process by which the guiding members of an organisation envision its future and develop the necessary procedures and operations to achieve that future (Goodstein, Nolan and Pfeiffer, 1992).

Strategic planning is about **analysis**, breaking down a goal into steps, designing how the steps may be implemented and estimating the consequences of each step (Mintzberg, 1994). It is an **ongoing process** requiring the gathering of information, discussion of the present and future state of the organisation and determining a plan of action which includes negotiations and decision-making. When these decisions are set out in a **document**, it is the **strategic plan** of the organization.

The process of strategic planning encourages us to think about the future in creative ways, to question conventional wisdom, to raise difficult questions, to challenge basic assumptions and to think outside the box. In the words of Arie de Geus, 1988, the one time head of Royal Dutch Shell, the real purpose of planning is to change the mental models, which decision- makers carry in their heads.

So, we need to take a long-term view of our operations in order to stay relevant to the continuously changing needs of our customers, the young people, the volunteers and the various key stakeholders.

5.1.5 SWOT analysis

SWOT analysis is a management tool for analysing the organisation's overall situation. SWOT stands for Strengths, Weakness, Opportunities and Threats. This approach attempts to balance the present internal strengths and weaknesses of the organisation with the future opportunities and threats presented by the external environment. The premise of the approach is that major issues facing the organisation can be dealt with through a thorough analysis of each of the four elements. Strategies can then be formulated to address the issues which emerge from the analysis.

Various methods of analysis can be used; statistical, application of cause and effect and input/output analysis (see handout topic 3.5). A combination of methods can be used and both tangible and intangible factors should be considered.

The results of the detailed analysis should then be compiled and interpreted by people with relevant experience and presented to teams, senior volunteers or committees for further action to be agreed. Analytical approaches will cover two situations:

(a) events which are over and the results are analysed and
(b) ongoing work which can be analysed as it is progressing with a view to improving the performance in management terms.

The table below provides some elements of organisations, which can be considered for analysis.

Internal Analysis (Present-focus)	
Strengths	**Weaknesses**
• A distinctive competence? • Adequate financial resources? • Good competitive skills? • Technology? • Proven management? • Competitive advantages? • Access to customers? • Others	• No clear strategic direction? • Lack of policies and procedures? • Poor image? • Poor track record? • Lack or obsolete equipment/facilities? • Lack of financial resources? • Ineffective structures and systems? • Others?
External Analysis (Future-focus)	
Opportunities	**Threats**
• Young people? • Public and private institutions support? • Forming strategic alliances? • New segments of society? • Complacency among competing organisations? • Faster economic growth? • Others?	• Other youth organisations? • Adverse demographic changes? • Slower growth rate? • Growing competitive pressures? • Changing needs of young people? • Adverse government policies? • Poor image of Scouting? • Others?

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Historical data

From an organisational point of view, a complete analysis will certainly require the following aspects to be examined:

- Historical background
- Memorandum and articles of the NSO; its study in the present context and its relevance in the expected future scenario.
- Special reference to the mission and objectives
- Organisation charts, policies etc.
- Annual reports
- Performance reports
- Present and future prospects, as seen currently.
- Relevant statistics like memberships, financial figures, etc.
- Publicity and public relations materials

When undertaking the SWOT analysis, all the important factors which influence the development, growth or decline of any organisation are considered and categorised as Strenghts, Weaknesses, Opportunities or Threats. The next step is to group all the items in each category and it may be helpful to grade the importance of each item.

The results can then be viewed in the group who should consider the steps required either to maintain or further strengthen strengths and opportunities, or to minimise, if not entirely eliminate the weaknesses and threats, or to convert them into opportunities.

A SWOT analysis can be undertaken for the general situation but it can also be applied to each strategic priority.

A SWOT analysis therefore can be used to help explore internal and external environments at various levels in associations which should improved decision-making to achieve the objectives specified. This analysis provides an important input for decision-making in the strategic planning process.

5.2   TOPIC 2: THE VISIONING PROCESS – SOME METHODS

Without a vision, organisations have no chance of creating their future, they can only react to it (Collins and Porras, 1991). A "vision" is therefore a picture of a preferred, desirable future state that describes what the organisation will be like in some years from now. It is a dynamic picture of the future that answers the question *" what do we really want?"* (Scott, Jaffe and Tobe, 1993).

Scott, Jaffe and Tobe, (1993), provide the characteristics of a powerful vision statement:

 'A Vision Statement' is a powerful statement which:
- presents where we want to go
- is easy to read and understand
- captures the desired spirit of the organisation
- is dynamically incomplete so that people can fill in the pieces
- is compact - can be used to guide decision-making
- gets people's attention
- describes a preferred, meaningful better and future state
- can be felt/experienced and gives people goose bumps when they hear it
- gives people a better understanding of how their individual purpose could be realised in the group or organisation
- provides a motivating force, even in hard times
- is perceived as achievable
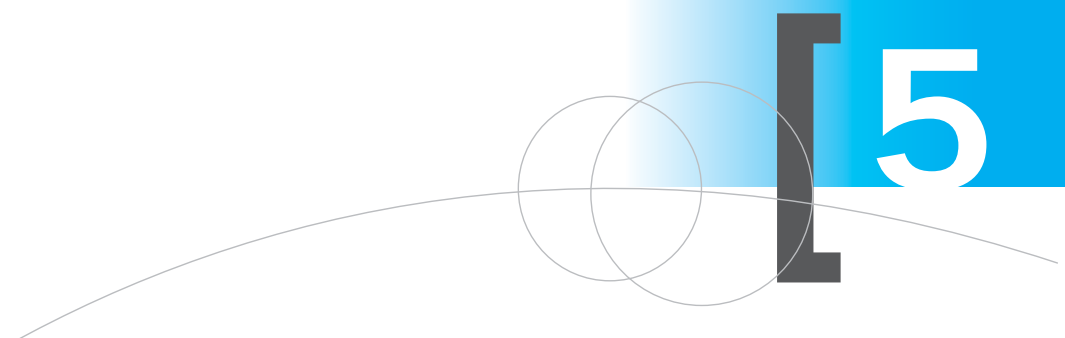- is challenging and compelling, stretching beyond what is comfortable

Here are three methods which can be used to create a vision.

5.2.1 Visualisation

The visualisation process starts with imagination - using sights, sounds, smells, tastes and sensations in the absence of any external stimuli.
It is a means of improving communication between the conscious and unconscious levels of the mind. Basically, it is about dreaming the future and is a powerful technique of modifying self-image (Tracy, 1993) as well as a technique for imaging how we see an organisation, like Scouting, in the future.

For example if we were applying this technique to modifying our self-image, we could visualise ourselves winning a prestigious award in 3 to 4 year times for an accomplishment that we desire. Questions to ask are: what were the accomplishments? What kind of award is received? Who presented the award? What dignitaries attending the award ceremony? It is important that you let your mind wander.

If this technique was applied to Scouting, people could be asked to 'visualise' the association in the few years time. Perhaps focussing on some event or events. They could ask themselves: What sort of event it is? How many people are present? What makes the event special for the participants? What do they remember when they return from the event? What do they do differently, how do they behave as a result of the event? The participants could then share their 'pictures' and identify what would need to be done to achieve their visions.

Remember visualisation is best achieved when people are in a relaxed state of mind (DePorter and Hernacki, 1992; Ostrander, Sheila and Lynn Schroeder, 1979; Stone, 1984, Swartz, R, 1991). It is important that the people taking part learn how to relax their minds. One way of achieving this is by sitting comfortably, closing your eyes and breathing slowly until you feel fully relax and calm. Allow nothing to distract your mind. Once fully relaxed, people can start visualising the desired and better future state.

The more we visualise a particular future event, the more impact it has on our thinking, feeling and acting. In fact the frequency with which we visualise not only tells us how much we want that future picture, but also intensifies our desire and belief that it is achievable (Tracy,1993).

5.2.2 Symbols and metaphors

"The soul never thinks without a picture." (Aristotle)

Symbols and metaphors can be used to project the pictures or images, which represent the vision. They are not logical, but they create an image that can challenge what is accepted as true, allow new links to develop and generate new ways of thinking (Gelatt,1991).
For example an animal can be used to describe an organisation. An organisation represented as a giraffe, conveys the impression that the leaders of the organisation are too concerned with seeing the far and wide but neglecting the details. It is just like seeing the forest but not the trees. People can be asked to draw a symbol or metaphor to represent the current state of their organisation. To create impact, coloured pens, flip chart paper, tape etc. should be used. This will draw out some of the issues and the challenges which the organisation faces. People can then be asked to draw a symbol or metaphor that represents the desirable future state of the organisation, once the vision is accomplished. The image and the elements of the picture drawn in terms of what they represent can be discussed.

It is important that the pictures that are created are discussed so that the reveal aspects of the current and desired future states of the organisation so that plans can be put in place to reach the desired results.

5.2.3 Scenario planning

"Scenario planning" first emerged for businesses in a company set-up for researching new forms of weapons technology in the RAND Corporation way back in 1967 (Chermack and Lynham, 2002). It is a descriptive narrative of plausible, alternative projections of a specific part of the future.

The steps to build scenarios are as follows:

1) Start of by looking at the forces or the drivers of change, which may possibly affect the smooth operational running of the organisation. You can look at socio-economic, political, technological and educational factors.

2) Analyse the impact and the likelihood of each driver or factor.

3) Next determine what is inevitable (the given, mandatory or non-negotiable aspects) and therefore must occur in all scenarios.

4) Identify the critical uncertainties and group them to understand how they may act together to split the future into different scenarios.
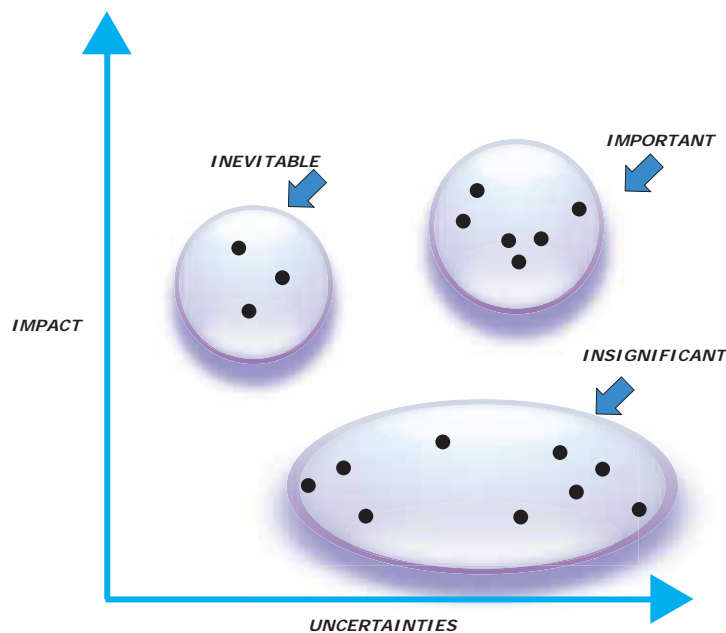
5) Check the interrelationships between the drivers of change. Consider using an influence map. See handout 3.2. Check that the scenarios are mutually exclusive and collectively exhaustive. Check that each scenario constitutes a challenging version of the future.

6) Develop a meaningful description of the scenarios, supported and verified by research and analysis. The higher the impact and uncertainties, the more important is the need to prepare the future for that scenario happening.

5.3   TOPIC 3: STRATEGIC PLANNING TOOLS

For the purpose of this kit, only six system tools in the form of diagrams are introduced in this section. The six system tools are: Systems maps, Influence maps, Spray diagrams, Force-field diagrams, Input-Output diagrams and Bar charts. The source of information on these system tools is the Open University (1994)

5.3.1 Systems maps

A Systems Map is essentially a "snapshot" of an organisation. It provides a picture of the internal components of the organisation and the players in the environment. Here is a systems map of a National Scout Organisation.

A system map of an NSO

Purpose

In the above diagram, the internal components or systems of an NSO are set out. The components include the National Council (NC), Volunteers, Professional staff which has its own functional departments like HR, Finance (F), Scout Shop (SS), etc., and the Scout Units.

Outside the NSO are the World Scout Bureau (WSB), Government Institutions, Educational Institutions, Community bodies, etc. Thus, the map provides us, at a glance a quick picture of the NSO and the environment it is operating in.

5.3.2 Influence maps

An influence map helps the reader to analyse the impact of the influences on the various components or sub-systems of an organisation and so identify the most important relationships.
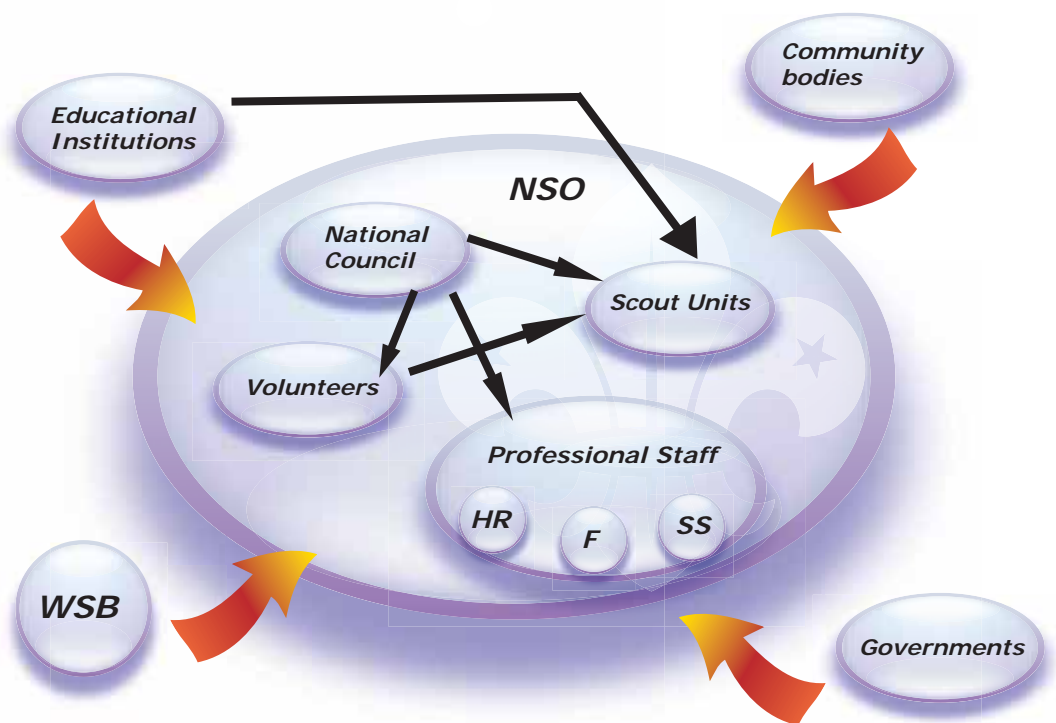

Influence map of an NSO

Purpose

By putting an arrow on the systems map drawn earlier (5.3.1), we have an" influence map". It shows the degree of influence one element has over one or several of the sub-systems. For example, in the above diagram, the National Council has a strong influence over the volunteers and the professional staff of the NSO since they are the policy makers of the organisation. This is shown by the thickness of the arrow. The educational institutions e.g. schools, have a direct influence on the affairs of the Scout units particularly if the Scout units are school-based. Like-wise, the community also exert influence on the activities of the Scout units. The volunteers can also have a strong influence over the management of the Scout Units. The World Scout Bureau has an influence on the management of NSO, as a whole.

5.3.3 Spray diagrams

Purposes

- To describe and explain the components of a system as a sub-system
- To show an overview of the various parts of a system and their interconnections

A spray diagram provides a quick overview of a given situation. In the example below, on possible causes to the resistance of change, we can easily see the possible causes at a glance. This overview can help us to pin point the root causes of the problem quickly.
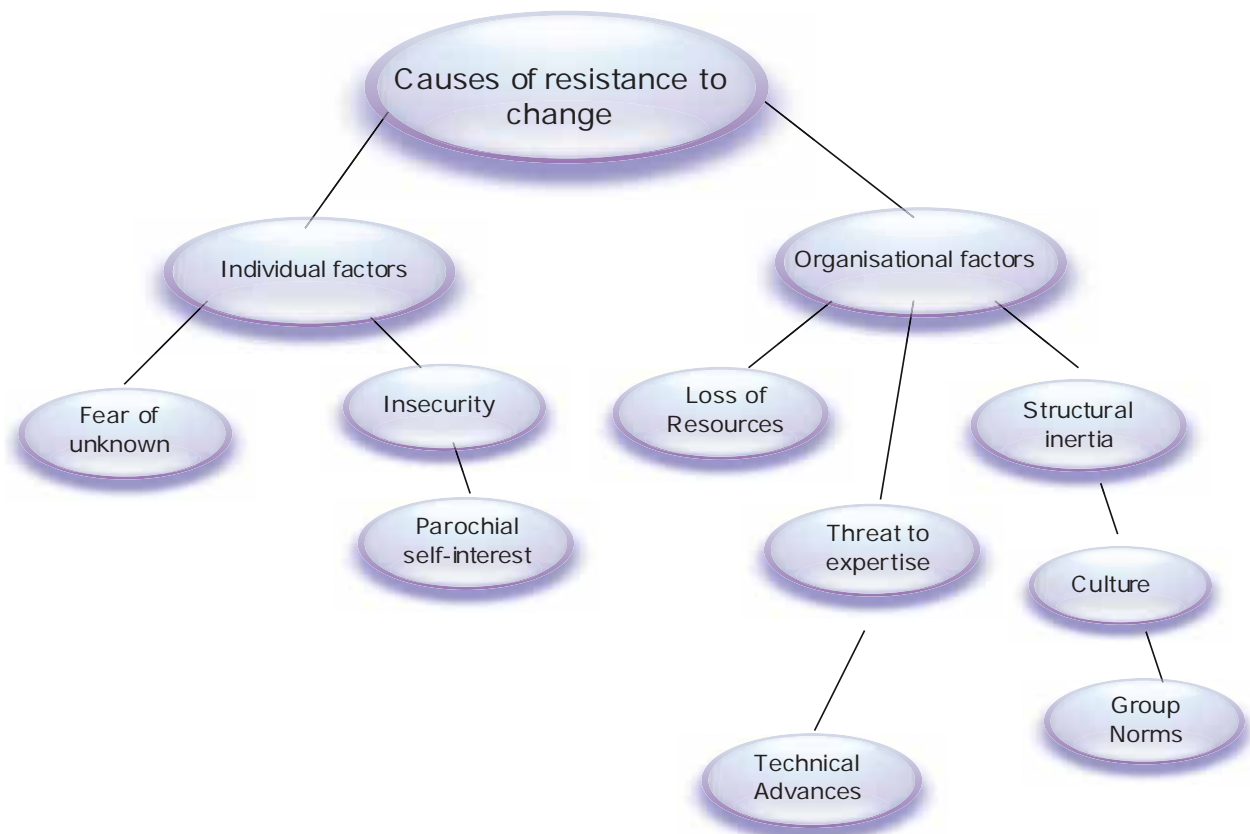
For example, the individual factors of resistance to change comprise fear of the unknown, and insecurity which can be a result of parochial self-interest. This format of presentation allows us to get understanding of the cause at a glance. It resembles the fishbone diagram which is commonly used in quality control circles to identify main issues and problems. It can also be used to provide a quick overview of the various parts of a system and their components.
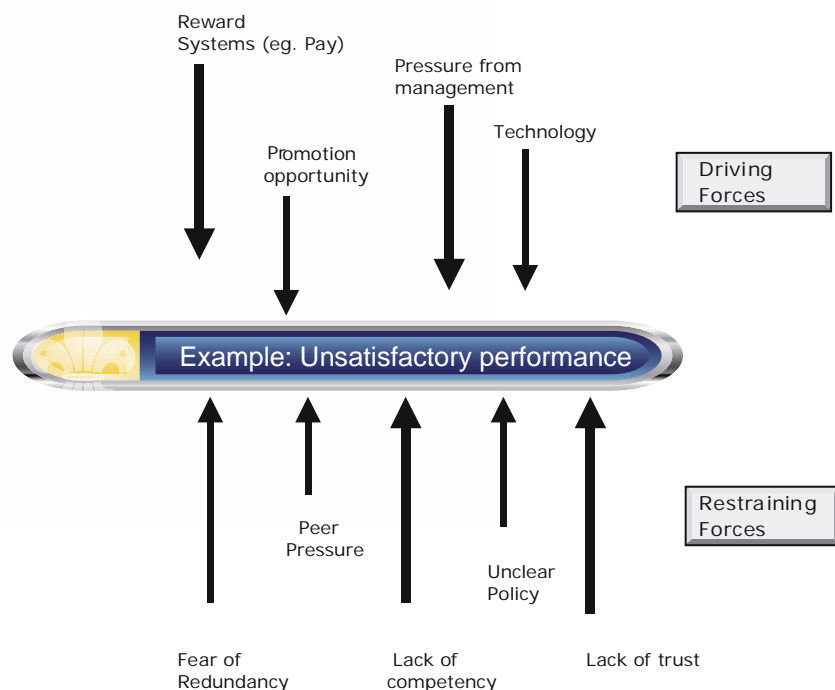
5.3.4 Force field diagrams

Purposes
- To identify the forces driving and restraining change in a given situation.
- To allow the magnitude of these forces to be represented.

The "force field" analysis, originally described by Kurt Lewin (Lewin,1951), is based on the premise that situations at any given point of time, are not static but are dynamically moving towards an equilibrium. This is as a result of two sets of interacting and opposing factors acting on the situation. The factors may be external or internal. One set of factors, referred to as the "driving forces", are acting to move the situation away from the current state, while the other set of factors, "restraining or opposite forces", are acting to maintain the status quo.

If the driving and restraining forces are apparentlly equal in strength, the present situation is not likely to change. Change will only take place if the driving force becomes stronger or the restraining force is reduced. The more effective way to make change occur is to reduce the restraining forces.

Reward Systems (eg. Pay)

Pressure from management

Promotion opportunity

Technology

Driving Forces

Example: Unsatisfactory performance

Restraining Forces

Peer Pressure

Unclear Policy

Fear of Redundancy

Lack of competency

Lack of trust

Notes:
- The size and length of arrows should denote the magnitude of forces acting.
- Some forces may act in both directions, e.g. political pressures which can change rapidly.
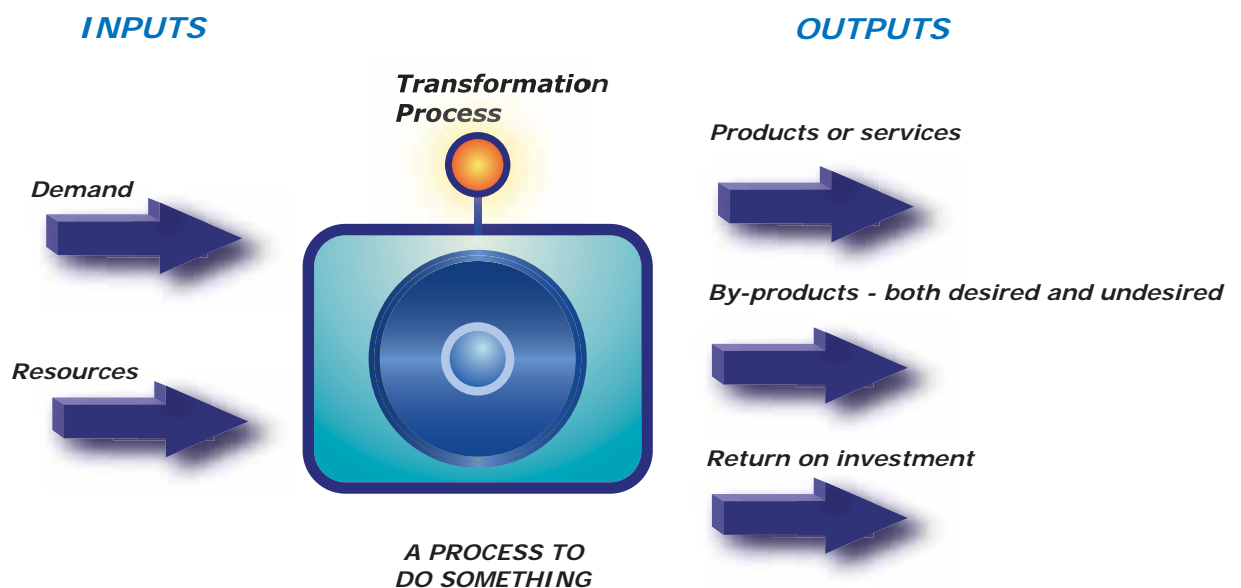
5.3.5 Input-Output diagram

Purposes

- To define the outputs or outcomes required from a given process.
- To determine the process required to produce these outputs.
- To determine the necessary inputs to allow the process to transform them into the required outputs.

This diagram is usually used to describe and analyse situations which are developing and changing. The inputs that are required for a given process, to achieve desired outputs, are identified. So, if what we want our system to do and produce can be clearly expressed, then we can identify the inputs that are necessary to make this happen. The 'transformation process' box reflects the system that is used for a given process, for example capital equipment such as machines and computers.

INPUTS   *OUTPUTS*

Transformation Process

Demand   *Products or services*

By-products - both desired and undesired

Resources

Return on investment

A PROCESS TO DO SOMETHING

5.3.6 Bar charts

Purposes
- To depict the sequence of activities in a process.
- To show the start time, duration and finish time on a scale.
- To indicate areas of overlapping and dependent activities in a process.

A bar chart is used primarily as a monitoring tool to track the progress of the project or activity based on the planned schedules. The chart provides a good overview of the timing and sequence of activities, together with their commencement and completion dates.

Time (days / weeks / months)
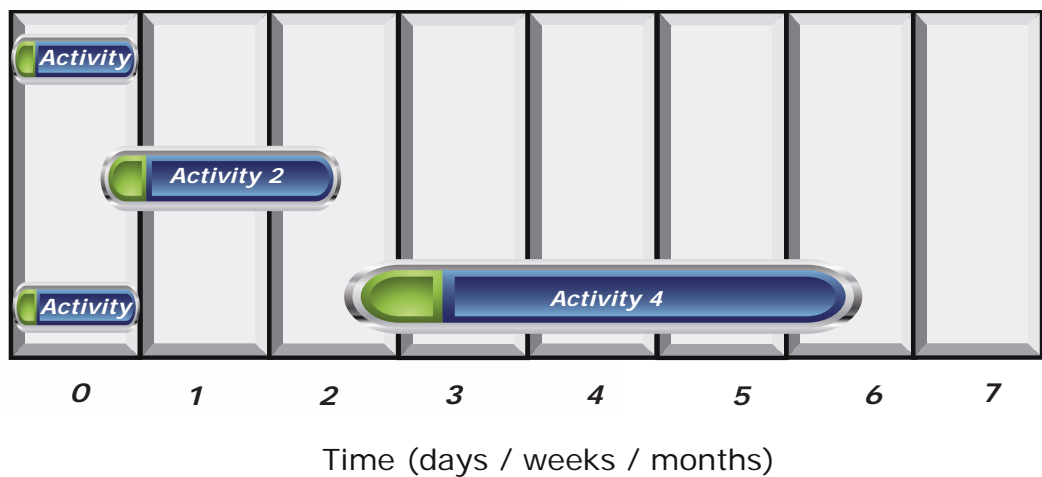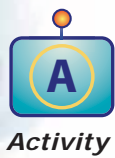
5.3.7 Application of systems maps/diagrams

The table below summarises the main uses of the systems tools.

| Application	Diagram Type
Diagnosing and describing situations	Systems maps
	Input - Output diagram
Analysing situations	Influence map
	Spray diagram
	Force field diagram
	Input - Output diagram
Planning and monitoring situations	Bar Chart

5.4 TOPIC 4: EVALUATION MODELS

5.4.1 The four level approach (Kirkpatrick's model)

Although it has been around for nearly 20 years, the Kirkpatrick Model (1979) is still the model most widely used to determine and plan different levels of evaluation. It comprises four levels which help us to determine whether we have achieved the goals and objectives which have been identified.

If, for example we consider the objective *" to improve the interpersonal skills of National Commissioners by the year 2005"*, focussing on level 3 'Behaviour' - we can analyse whether there are changes in the way the Commissioners manage their leaders that result in improved morale and effectiveness in the leaders.

REACTIONS — Level 1

LEARNING — Level 2

BEHAVIOUR — Level 3

RESULTS — Level 4

Training Impact
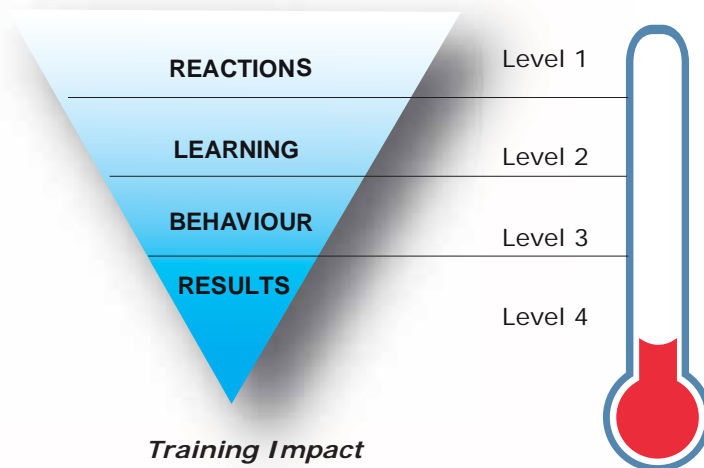
Whilst this model is useful as it stands, it can be further enhanced by the addition of a Level 0 and Level 5.

Level 0 (Pre-training) is the initial status or benchmark against which the effectiveness of the training - can be measured. An assessment of the pre-training knowledge, skill and attitudes are invaluable in providing a point for comparison with level 2 and level 3 data.

Level 1 (Reactions) is concerned with the measurement of people's immediate attitudes to the training provided:
• Was it useful and relevant?
• Did they feel comfortable with it?
• Did it cover what was planned?

'Happy sheets' i.e. feedback obtained during the training and assessments by the trainer of the materials used are the most common methods used at this level.

Level 2 (Learning) is concerned with measuring the learning achieved as a result of the training or the planned change.

- What can participants do that they could not do previously?
- What do participants know that they did not know previously?
- What perception or understanding have participants gained that they did not have previously?

Questionnaires, quizzes and practical tests to check for any change in knowledge, skill or attitude are useful at this level.

Level 3 (Behaviour) is concerned with measuring how actual workplace performance has changed as a result of the training or planned change.

- To what extent has learning been transferred to workplace performance?
- To what extent has workplace performance improved as a result of learning?

Evaluation at this level usually requires the involvement of an immediate superior in setting post-training assignments which require and test newly acquired learning, or in observing and giving feedback about changes in day-to-day workplace performance.

Level 4 (Results) takes a longer perspective. It is concerned with measuring the extent to which the planned change has contributed to the overall organisational performance. For example, if our main purpose is to enhance the image of Scouting, we can make an analysis of one performance/outcome, say, membership growth and ascertain to what extent the growth is due to the improved image. In other words:

- Are we getting the desired result?
- Have we achieved the outcome of what we want to achieve based on the strategic plan?
- Have we realised our vision?

Measurement at this level needs to focus back to the identified contribution which the planned change would make to the performance and/or needs of the organisation as a whole. If, for example, one of the reasons or objectives for the strategic plan is to reduce operational costs, then the measurement would need to involve some comparison of pre-and post-planned change in operational costs

Level 5 (Return on investment) is also important since it provides a financial value to the organisation after implementing the planned change. We look at the cost benefit ratio, which is calculated as follows:

Return on investment (ROI) = financial value of change or effect achieved (benefits) over the cost of achieving it x 100 %. Hence, the higher the ROI, the better it is for the organisation, since it is getting more benefits out of the same amount spent.

Rationalising evaluation: a point to note.

It is important not to get 'carried away' with an evaluation effort that is disproportionately greater than the investment made or the benefit likely to be achieved. In this respect, the scope of an evaluation strategy should be carefully weighed against the following considerations:

• The resources required in terms of money, staffing, equipment and facilities
• The likelihood that the training or event will be repeated
• The criticality of the training or event to the business
• The methods used

5.4.2 The 'balanced scorecard' model (BSC)

The "balanced scorecard" is a performance measurement system, strategic management system and a communication tool (Niven, 2002). Initially described as a '4 box 'approach to performance measurement (Kaplan and Norton, 1992), it combines traditional financial measures with non financial measures by focusing on four business perspectives, namely the customer, financial, learning and growth and the internal business process.

BSC provides answers to four basic questions:

• How do we look to our shareholders/trustees? (financial perspective)
• How do customers see us? (customer perspective)
• What must we excel at? (internal perspective)
• Can we continue to improve and create value? (learning and growth perspective)

BALANCED SCORECARD STRATEGIC PERSPECTIVES

How do our customers see us?

What must we excel at?

Do we get the best deal for the Government?

Do we continue to improve and create value?

CUSTOMER

FINANCIAL

INTERNAL BUSINESS PROCESSES

LEARNING AND GROWTH

Mission Vision Strategy

5

The learning and growth perspective are the 'enablers' of the other perspectives, serving as a foundation for the rest (Niven, 2002). For example, motivated staff with the right mix of skills (Learning & growth perspective) equipped with the necessary tools and doing the right things (Internal process perspective), will then satisfy and delight the customers (customer perspective) resulting in more in more business, ultimately driving the financial returns (financial perspective).

Performance indicators/measures

Two types of indicators are used. The lag indicators are outcomes of action previously taken, while the lead indicators are measures that lead to or drive the outcomes/results in the lagging indicators. Percentage increase in membership, market share may all be considered 'lag indicators'. But what drives each of these indicators?   For example, the numbers of programme activities organised may drive membership increase and market share may be driven by brand awareness.   'Lead indicators', sometime called performance drivers, are therefore measures that predict the performance of lag indicators.

The table below summarises the key points

	Lag Indicator	Lead Indicator
Definition	Measures focusing on results at the end of a time period.	Measures that "drive" or lead to the performance of lag measures, normally measuring intermediate processes and activities.
Examples	• Market share (% in membership). • Policies, documents produced, new programme introduced, etc. • Employees satisfaction.	• Hours spent with customers (young people, volunteers, etc). • Number of proposals, drafts submitted, discussions held, etc. • Absenteeism rates, turnover rates, training hours per employee, etc.
Advantages	Normally easily to identify and capture.	Predictive in nature and allow adjustments to be made based on results.
Issues	Historical in nature and do not reflect current activities; lack predictive power.	May prove difficult to identify and capture; often new measures with no history at the organisation.

A good scorecard should contain a mix of lag and lead indicators (Niven, 2002, Olve, et al. 2003). Lag indicators without performance drivers fail to inform us of how we hope to achieve our results. Conversely, lead indicators may indicate key improvements throughout the organisation, but on their own they do not reveal whether these improvements are leading to improved customer and financial results (Niven, 2002).

How many measures do the balanced scorecards need? There is no thumb rule on this. The right number of performance measures should be sufficient to adequately describe the strategy across four the perspectives of the BSC (Niven, 2002).

The importance of cause and effect linkages (strategy maps)

What really separates the BSC from other performance measures is the emphasis on the cause and effect. The cause-and-effect linkages outlines the specific path to take to achieve the strategy through a series of connections, without which we are left with nothing more than a mere collection of financial and non-financial measures. These measures should link together in a chain of cause-and-effect relationships from the performance drivers in the learning and growth perspective all the way to other perspectives. The relationships are revealed through a series of **"if-then" statements**: <u>If</u> we increase customer loyalty, <u>then</u> we expect revenue to increase or <u>if</u> increase training, <u>then</u> cycle times will lower. <u>If</u> cycle times lower, <u>then</u> loyalty will increased. <u>If</u> loyalty increased, <u>then</u> revenue will increase. We are attempting to document the strategy through measurement, making the relationships between the measure explicit so that they can be monitored, managed and validated (Niven, 2002).

For example in pursuing a growth strategy, we hypothesise that loyal customers providing repeat business will result in revenue growth in the financial perspective of the BSC. We then ask series of questions as follows:

How do we achieve superior levels of customer loyalty? We believe that the internal process needs to be improved.

Now we ask what internal business process must we excel at in order to drive customer loyalty and ultimately increase revenue? We believe that customer loyalty is driven by our ability to continuously innovate new products and therefore decide to measure new product development cycle times in the internal business perspective.

How do we improve development cycle time? We believe that by investing in staff training on new development initiatives may eventually lower development cycle times and is then measured under the learning and growth perspective of the BSC.

Finally, we ask what skills are required and how do we provide them so that we can lower the development cycle time?

Questions to ask when building the cause-and-effect linkages (Adapted from Balanced Scorecard: Step-by-Step by Paul R. Niven, 2002).

5

Learning and growth

Do the employee learning and growth objectives and measures describe the skills, information infrastructure and the alignment that will enable us to excel at our internal process?

Internal process

Have we identified the key internal processes we must excel at in order to meet customer and financial expectations?
Will the achievement of these measures lead to improved customer and financial results?

Customer

Do the customer objectives and measures reflect the value proposition we will pursue to achieve our financial goals?

Financial

Do the financial objectives and measures describe how we will satisfy our stakeholder expectations?

Others

Do we have an appropriate mix of lagging and leading measures on the BSC?

To sustain improvements, the BSC should contain measures that will lead to short, intermediate and long-term value creation. Have we considered the timing of the linkages?

Does this BSC tell the whole story of our strategy?

Balance in the scorecard

The statements below provide an explanation as to why the termed "balance" is emphasised in the scorecard.

- Balance between the financial and non-financial measures / indicators of success as it was primarily designed to overcome the deficiencies of a reliance on financial measures of performance by balancing them with the drivers of future performance. This remains a principal tenet of the system.

- Balance between the internal and external constituents of the organisation with the shareholders or the trustees representing the external constituents while the employees and the internal business processes representing the internal constituents. BSC recognises the importance of balancing the occasionally conflicting and contradictory needs of all these groups in effectively implementing the strategy.

- Balance between the lag and lead measures / indicators of performance. While lag indicators generally represent past performance, lead indicators represent the future drivers leading to the achievement of the lag indicators. As mentioned, earlier a well-designed scorecard should include a mix of lag and lead indicators.

5

5.5 TOPIC 5: MANAGING GROUP PROCESS DURING DISCUSSIONS

5.5.1 Managing discussions effectively

Here are some points on how to manage discussions effectively:

- Present the purpose of the discussion and highlight the specific tasks.

- Establish process ground rules, such as how the decision/s will be made.

- Allow members to become acquainted with each other and the topic under discussion.

- Create a supportive climate, emphasising the need to be constructive and build on other people's suggestions as opposed to criticising other people's suggestions and ideas.

- Focus on the task and not the person.

- Allow the opportunity for everyone to air his or her views, freely. Encourage participation by all members. One way is ask everyone for his or her input.

- Respect each view and opinion. Remember there is no good or bad view...it is just the different perspectives held by individuals. Disagreement should be based on facts or commonly held values. In some cases, agree to disagree.

- Discourage premature evaluation of ideas.

- Encourage people to share their experiences relevant to the topic of discussion. Use examples for clearer illustrations.

- Ask open-ended questions which require an explanation, rather than closed questions which can be simply answered with a yes or a no.

- Ask for clarification on points, which are ambiguous or unclear.

- Listen and make eye contact with those who are talking and summarise their points when they finish.

- Be aware of cultural issues; some members may be reluctant to express views contrary to the prevailing sentiment of the group, especially in the presence of high status members or formal leaders who may be dominating the discussion.

- Be aware of the body language.

- Summarise all the points or issues raised and the decisions taken before closing the discussion.

- Above all, effective leaders facilitate, rather than dominate the group discussion process.

5.5.2 Suggestions for dealing with disruptive and difficult behaviour

(Source: Adapted from People, 1988, p.147-155)

Type	Behaviour	Suggested Response
Hostile	"It'll never work". "That's a typical finance viewpoint".	"How do others here feel about this?" "You may be right, but let's view the facts and evidence". "It seems we have a different perspective on the details, but we can agree on the principles".
Know-it all	"I have worked on this project more than any-one else in this room..." "I have a Ph.D in...and..."	"Let's review the facts" (avoid theory or speculation). "Another noted authority on this subject has said..."
Loudmouth	Constantly blurts out ideas or questions. Tries to dominate the discussion.	Interrupt: "Can you summarise your main point/question for us". "I appreciate your comments, but we also need to hear from others". "Interesting point. Help us understand how it relates to our subject".
Interrupter	Starts talking before others are finished.	"Wait a minute, Tom, let him finish what he is saying".
Interpreter	"What Tom is trying to say is..." "Tom would respond to that question by saying..."	"Tom, how would you respond?" "Let Tom speak for himself, go ahead, finish with what you were saying". "Tom, do you think he correctly understood what you said?"
Gossiper	"Isn't there a regulation that you can't..." "I thought I heard the Chief say..."	"Can anyone verify this?" (Assuming no response) "Let's not take the time of the group until we can verify the accuracy of this information".
Whisperer	Irritating side conversation going on between people.	Hints: • Stop talking and establish dead silence. • Politely ask the whisperer to wait until the discussion is over to finish his/her conversation.

Silent distractor	Reads newspaper, rolls his/her eyes, shakes his/her heads, fidgets.	Hints: Ask them to determine their level of interest, support and expertise. Try to build an alliance by drawing them into the discussion. If that doesn't work, discuss your concerns with them during a break.
Busy-busy	Ducks in and out of the meeting repeatedly, taking messages, dealing with crises.	Hints: Preventive measures include: Scheduling the meeting away from the office, checking with the common offenders before the meeting to ask if the planned time is OK for minimum interruptions.
Late- comer	Comes late and interrupts the discussion.	Hints: Announce an odd time (8:46) for the discussion to emphasise the necessity for promptness. Make it inconvenient for latecomers to find a seat, stop talking until they do. Establish a "latecomers' kitty" for refreshments. Ask them to commit
Early leaver	Announces, with regrets, that he/she must leave for another important activity.	Hints: Before starting, announce the ending time and ask if anyone has a scheduling conflict.

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6 Strategy

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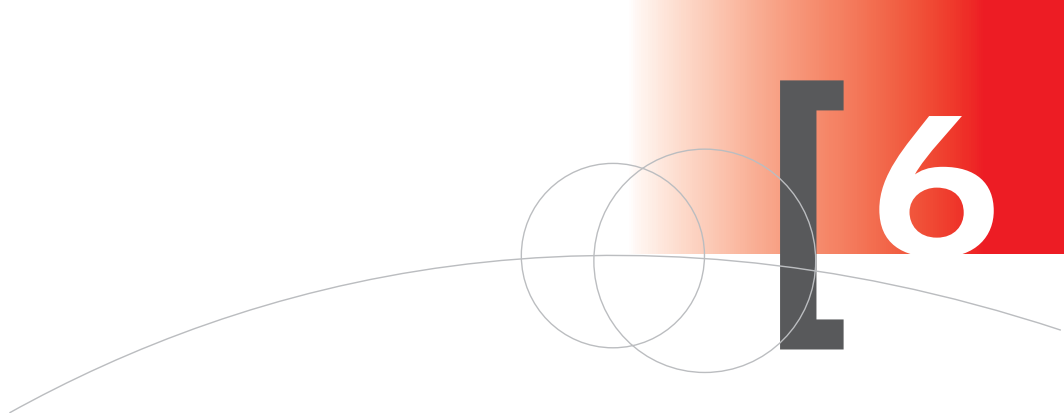**Presentations and Resources**

6

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Presentations
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This kit supports Strategic Priority 6: An Organisation for the 21 Century. This strategic priority aims at assisting National Scout Organizations, as well as WOSM itself at world and regional levels, to adopt a strategic approach to reviewing their structures, systems and management to enable them to be sensitive to the changing needs of society and to respond quickly and effectively.

A number of presentations and resources are available to support work in this strategic priority. Further information is set out below and the resources and presentations can be found on the CD-ROM which accompanies this kit and from the strategy pages on the WOSM web-site **www.scout.org**

6.1   PRESENTATIONS

6.1.1 The Strategy for Scouting – a general presentation

This general presentation contains 15 slides with information on the process and content of the Strategy for Scouting.

6.1.2 An Organisation for the 21 Century – presentation to the World Scout Conference in Thessaloniki (2002)

This presentation was prepared for the World Scout Conference in Thessaloniki (2002) and provides information on why the priority is important and gives an example of work undertaken in The Scout Association to respond to the needs of leaders, making information and support more accessible. This presentation is accompanied by a script.

6.1.3 Strategic Planning – the Strategy for Scouting and Strategic Planning

This presentation supports the content of this kit and contains 25 slides with information on the Strategy for Scouting, systems thinking, strategic planning, the Mission, the Vision and vision statements, SWOT analysis, action panning and resistance to change.

6.2   RESOURCES

6.2.1 Promising Practices

Promising Practices are a series of stories which highlight work in associations that contributes to each of the strategic priorities. Each story has the same structure – the results (what the project achieved), the reasons (why the project was undertaken), the methods (the actions undertaken), the learning and the future plans. The Promising Practices for this strategic priority describe work in Canada, Croatia, Pakistan and the United Kingdom.

6.2.2 The Bottom Line

The stories in this series are targeted at external partners and potential funders and highlight the impact of Scouting and its potential to make a difference.

6.2.3 The Workstreams

Work on the strategic priorities is supported workstreams; small groups which manage the overall work in each area of the strategy. The workstreams comprise members of the World Scout Committee and members of staff in the offices of the World Scout Bureau.

6.2.4 Expected Results and WOSM's Support

The Expected Results and WOSM's support set out what should be achieved in the strategic priorities and the support that will be provided by WOSM to help associations achieve this.

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The CD-ROM which accompanies this Strategic Planning Kit contains the text in pdf format for each of the chapters. The PowerPoint presentations are also available.

As strategic planning supports the implementation of the Strategy for Scouting, the CD-ROM also contains all the resources to support the strategy and each of the strategic priorities. The CD-ROM will open at Strategic Priority 6: An Organisation for the 21 Century, which is where the strategic planning kit is located.

All the resources available on this CD-ROM are also available on the WOSM web-site
www.scout.org

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