



Strategic Planning Initiative Frequently Asked Questions

Updated December 2007

1. What do you mean by “strategic planning” and why it is important to us?

A strategic plan is a document that provides long-term guidance and clear direction to the entire organization, instead of individual, incremental, year-by-year changes driven by administrative and traditional annual changes in leadership. A good strategic plan will help us plan our work, identify projects, create policies, set priorities, and allocate resources wisely to meet the needs of the future. It will help us translate goals into actions in a more coordinated and focused way. And, no matter who is in a specific leadership role over the next five years, this plan will guide their activities and provide an aligned framework for service whether it is at the grassroots unit level, the department level or the national level. This alignment and clear direction can serve to heighten the sense of accomplishment for both the individual volunteer member and the organization at large.

There are several reasons why strategic planning is important to the Auxiliary.

For the past 10 years the membership of the American Legion Auxiliary has been declining and the percentage of decline is increasing even more in the past couple of years. We know that while our organization has traditionally attracted older members, there are many family members of all ages who could join with us in our work based upon their eligibility through a veteran. But many do not seem interested in doing so. We also recognize that the role of women within society has changed dramatically since the founding of our organization. We are examining how our practices can attract today’s women, who are often looking for vital and relevant organizations to give of their time, talent and financial resources.

The War on Terror has raised our awareness of the needs of a new generation of veterans and their families. We realize frequent and multiple deployments, including National Guard and Reserve components, are placing many hardships and stress upon military and veterans’ families. As an organization dedicated to serving these families, we must be capable of reacting quickly and effectively to meet their needs. It is also important that we anticipate their long-term needs and position ourselves to serve them well into the future.

Our society as a whole has become more complex as technology increases the speed at which we get information, expect results and demand services. Volunteerism is not immune to these changes. Flexibility and creativity will be required as we mobilize today’s volunteers under our long standing banner of “service, not self.” Competition is fierce for those willing to give of themselves to enrich and enhance the lives of others, requiring that we not only serve our constituents well, but also value our members as they perform this service.

As our National President told those who attended the strategic planning retreat, “We are embarking on a monumental project of grave importance to our organization. Our course must be with the future. Our world as we know it is changing, which requires us to look for new ways to solve problems and seize opportunities to serve those veterans and their families at the heart of our mission.

“Courage is needed. We must lead vigorously. We are at a turning point in our history. We have a choice to make – embrace a new future or suffer a natural decline. Our culture, our values are shaped by history and so our values and our principles will give us the strength and the confidence to meet this great challenge. And make no mistake, this is a great challenge!

“We will not abandon our traditions or our respect for the individual. We will cherish much of our yesterday, while realizing we are charting a necessary new course for the future, building a better tomorrow for our organization and those we serve.”

2. Is The American Legion aware of our strategic planning initiative?

Throughout the fall at various opportunities, the National President will be sharing personally with The American Legion through conversations with the National Commander. She will share with him the efforts of the ALA in future planning. She is looking forward to stressing the value we anticipate our future plans will bring to the partnership we have with The American Legion in serving our veterans and their families.

3. We have heard there was a strategic planning retreat in Indianapolis in September of 2007. Who attended this retreat and how were they selected?

On September 14-16, fifty members and staff met for a three-day strategic planning retreat. Those in attendance were selected last summer by then National President JoAnn Cronin. President Cronin asked for recommendations from a number of sources at all levels of the organization as she worked to establish a true sampling and cross-section of our membership for the meeting. In the process she also considered criteria such as age, ethnicity, level of involvement, relationship to our constituency, and geographic location. At that time, President Cronin also tasked then National Vice President Jan Pulvermacher-Ryan with overseeing the preparations for the planning process.

4. Was there a consultant involved in the process?

Yes, the organization hired Lori Silverman, principal of Partners for Progress, to guide us through the strategic planning process. Lori is a speaker, consultant, trainer and author who strives to connect people to possibilities and to each other. Her savvy, yet down-to-earth style, have helped dozens of organizations to realize their true potential and professional success. Lori owns Partners for Progress, a management-consulting firm dedicated to helping organizations achieve and maintain a sustainable competitive advantage in their marketplace. She’s authored myriad books, articles and workbooks including *Critical SHIFT: The Future of Quality in Organizational Performance* and *Stories Trainers Tell: 55 Ready-to-Use Stories to Make Training Stick*. Her new book is titled, *Wake Me Up When the Data is Over: How Organizations Use Stories to Drive Results*. Having earned two Master’s, in business and in counseling, and a B.S. in psychology, Lori shares a fascinating perspective with her audiences.

5. What happened at the retreat?

The purpose of the retreat meeting was to develop the beginnings of a five-year strategic plan for the American Legion Auxiliary that will guide us into the future. Throughout the first day we discussed the findings of our research on future trends and the implications to the ALA. Among the nine different categories were economics and social trends, government relations to the non-profit sector, technology, competitors, partners and sponsors, the environment and the military.

We also discussed the current state of affairs within the Auxiliary, looked at potential threats and listed assumptions we felt fairly certain would impact us in the year 2012. Together we worked on streamlining our mission statement and clarifying our vision so that we could easily and quickly tell others what we do, for whom and why.

Using a variety of steps and working groups throughout the process, we developed a list of breakthrough strategies. Ultimately together we agreed upon the top three strategies from that list and spent time developing and then prioritizing the goals for the first year plan. As one member of the group exclaimed when we got this done, "Wow, this is awesome!" And she is right, it was awesome!

6. What were the three strategies that came out of the retreat?

Two of the strategies are focused internally to help us develop our ability to conduct the operations of our work and improve our communications. One strategy will focus on developing operational standards for each level of the organization and training to help achieve them.

Another will focus on leveraging technology to improve operations and communications. The third strategy will focus outwardly towards those we serve as we develop plans to become a clearinghouse for information, programs and ideas.

The National Executive Committee will review and consider for adoption the strategies along with proposed first year plans at its spring meeting in Washington, D.C. in late March 2008.

7. Is the Mission of our organization going to be impacted by the strategic plan?

Ultimately, one goal is to increase the impact of our mission upon those we serve. However, we do not anticipate any changing of our mission. In fact, the retreat group worked hard to clarify the current mission. They also worked to craft a simple vision statement by asking the question, "In the eyes of our future members what do we need to become?" Their work resulted in the following statements that will be presented as part of the plan for adoption by the National Executive Committee:

The mission: The American Legion Auxiliary serves veterans, their families and their communities.

The vision: The American Legion Auxiliary enriches the quality of life of those we serve and our members.

8. Now that the retreat is over, what happens next?

As part of our next steps, three groups have been formed to begin to work on the goals, activities, timelines, and budgets for the first year plans for each strategy. A national volunteer is leading each of these groups. Lori Silverman, our professional consultant, has also been hired to assist them in this process.

In addition, a Strategic Planning Oversight Committee chaired by National volunteer Rita Navarrete is charged with reviewing and monitoring the progress of the three groups and pulling the plans together into one document. This group is also charged with communicating information about the process and plan throughout the organization. National Secretary and Chief Operating Officer, Pam Gilley, is working closely with this committee as well. National President Jan Pulvermacher-Ryan will ultimately be presenting this plan to the National Executive Committee for consideration at its meeting in Washington, D.C. in late March 2008.

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9. When will we have an opportunity to hear more or participate?

During our regular annual spring gathering in Washington, D.C. we will be providing an opportunity for many to share in the process and learn more about our research and planning. The dates for this meeting are March 29-30. While more information will be available at a later date, you may contact us at strategicplan@legion-aux.org to make inquiry about participating in the event.

10. What can I expect to change right away?

After identifying our three strategies, we identified what we thought were the most important first steps and the interrelationship of the steps within the three strategies. The next steps will be for individual volunteer work groups to follow a prescribed, multi-step process to establish clear plans for our long-term achievement of our strategies. Since we are creating a five-year plan, we anticipate the accomplishment of various goals along the way and the necessity of continual evaluation and planning. You may anticipate hearing more about the plans and their implications on a regular basis.

11. How are only 50 people going to change our organization?

The future planning that will follow the retreat will involve many, many people. The individual groups being formed to create the annual plans for each of the strategies involve even more members. Many others will be working to plan the informational and participation sessions for large groups at Awareness Assembly. The oversight committee will be working to insure we have a sound communication plan, stay within our timeline and develop solid budgets.

12. What is it going to cost us?

As we invest in the future of our organization, we realize that the expense today of planning for tomorrow can multiply our impact and return on our investment 100-fold. Annual operating budgets for planning and implementation will be developed and approved per our standard processes.

13. If we want to discuss the process with someone, whom do we contact?

Overall communication regarding the process is being handled by the Strategic Planning Oversight Committee. If you would like to speak to one of the members of this team, please email them at strategicplan@legion-aux.org.

14. How can I get involved?

We are always looking for those who are truly interested in helping us plan for the future of the Auxiliary. Please contact us at strategicplan@legion-aux.org to indicate your interest and someone will contact you to discuss how you can be involved.

15. How long do you anticipate this taking?

We are beginning by planning five years out and establishing goals we can achieve each year within those five years. In addition, we know that we must continually be evaluating our progress and reevaluating our world to ensure we stay relevant not just in the next five years but far into the future.

16. What is specifically going to change?

At this time, the specifics are not yet identified. Within each of the identified strategies we recognize that we must plan our work to strengthen our organization through enhancing and enriching our programs, maintaining our core values, and positively impacting our ever-evolving world.

17. We have heard that you will be eliminating Departments. Is this true?

At the September strategic planning retreat, attendees were encouraged to share all of their ideas; nothing was off-limits for consideration. One person offered a written comment about the future viability of Departments. However, it was simply that—a comment that was added to a long list of comments during a brainstorming session. There is no action underway to change the current structure of the American Legion Auxiliary.

Going forward, one responsibility of the Unit and Department Operational Standards and Training Breakthrough Strategy Team is to analyze and evaluate the standards for which our Departments operate. After clarifying any areas needing attention, it will work towards implementing cohesive and comprehensive policies and procedures that will enable Departments (and Units) to function more efficiently. The team recognizes that a “one size fits all” approach is not viable. Therefore, its challenge is to assemble the minimum requirements for efficient operating standards and help all Departments achieve them. Upon successful implementation, it is hoped that all Departments will comply in these key areas.

18. Should Departments be preparing their own strategic plans?

As the strategic plan begins to take shape, our hope is that it will begin to give direction to all levels of the organization so that we are moving as one in the execution of conducting our mission and vision. Once the plan is adopted by the National Executive Committee in March, it will be shared with all Departments. Plans are also being made to share the plan with the general membership through national publications and through distribution of information by the Departments. Departments will receive information about how to proceed with Strategic Planning at the large group meeting held at the beginning of the Awareness Assembly in Washington, DC. Our goal with the current national initiative is to enhance the organization through common breakthrough strategies, goals and activities. Common goals and activities will allow us to focus our efforts, direct our resources and more clearly evaluate our success for those we serve.

19. How do you see the strategic plan impacting things such as the annual “themes” selected by each president?

As the strategic plan begins to take shape, it will quickly begin to impact the annual operational work of the organization. There are various possibilities that could happen with the annual themes selected by our Presidents. They could agree to have a common theme for a period of time. They might agree to select different themes as long as they have a strong relationship to where the strategic plan is during that President’s term. Since incoming national leaders are involved in the development of the strategic plan, they are aware of this impact and are involved in leading the changes.

20. Is there any overlap in the work of the three breakthrough strategies? If so, how is this being addressed?

It is the responsibility of the Oversight Committee, chaired by Rita Navarrete, to address this issue. A conference call is conducted each month with team leaders, the Oversight Committee chair, the National President and the National Secretary to share and discuss this information. The Oversight Committee will meet in January to clarify possible overlaps and how to effectively manage them. In addition, an Assessment Sub-team has been formed to look at common areas where each breakthrough team needs to collect data and information in the organization.

21. We have heard there is going to be a large meeting in Washington, D.C. during Awareness Assembly. What can you tell us about this?

A highly interactive large group meeting is being planned for anyone who would like to attend (space available for 500) for Saturday afternoon and Sunday morning, March 29-30, 2008. The purpose of this meeting is to give attendees and members an opportunity to experience the future of the American Legion Auxiliary.

The meeting will provide a chance for participants to explore the future of our world and the impact it will have upon the future of the American Legion Auxiliary. It will also provide a chance to:

- Learn more about our leaders' dreams for the organization and how they fit with our vision;
- Learn how the three breakthrough strategies will make the organization more successful;
- Learn about your role in the implementation of our strategies.

22. What is the communication plan for getting information about the organization's long-range plans from National to Departments and Units?

The large group meeting in March will address how those in attendance can move forward with National's planning efforts. Those planning the meeting are inviting all Department Presidents, Department Secretaries and incoming Department leaders to attend. If the plan is approved by the NEC the evening of Sunday, March 30, a summary of the plan will be made available the next day to all in attendance at the Awareness Assembly. Information is also available through national publications, electronic alerts, and on the ALA's website through documents like this one. Future communication strategies are being developed by the Oversight Committee. Questions may also be directed to leaders at strategicplanning@legion-aux.org.

23. We have heard the plan is a three to five-year plan. When does the first year begin?

The first year of the plan cannot be implemented until it is presented to the National Executive Committee at their spring meeting in Washington, D.C. If the plan is approved, the first year will run from April 2008 until August 2009. Utilizing an extended year will help align the plan around the National fiscal year, which ends September 30th.