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|  | ***Slogan here…\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***  **The Rolling 3-Year Strategic Plan** ▪ **2017, 2018, 2019** |

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| **MISSION** Why we exist | **Our mission is to …** Note: Peter Drucker said the mission statement should fit on a t-shirt. |

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| **VALUES** How we will treat each other and our constituents | **We value…**  Note: No more than 3 to 5 core values that are memorized and lived out! See “The Culture Bucket” chapter (Pearson’s *Buckets* book) and Patrick Lencioni’s “Make Your Values Mean Something” *HBR* article. |
| **VISION** What we want to be in the future. | **IMAGINE IF…** **the Boys & Girls Clubs of East Texas will be used by God to…** |

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| **BHAG** Not achievable without God’s unique blessing. | **By \_\_\_\_\_\_\_, our Big *HOLY* Audacious Goal is to…**  Note: The BHAG should be written as a “SMART Goal” and be both succinct and measurable. (For balance, read *The Choice: The Christ-centered Pursuit of Kingdom Outcomes*) |

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| **Visionary Priorities**  **The Rolling 3-Year Plan is updated annually by November 15.🡺** | **Year 1: 2017**  **Jan. 1 – Dec. 31** | **Year 2: 2018**  **Jan. 1 – Dec. 31** | **Year 3: 2019**  **Jan. 1 – Dec. 31** | **Add 2020**  **by Nov. 15, 2017** |
| **#1**: (verb)…  **TO BUILD** a … | * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| **#2**: (verb)…  **TO CREATE** a … |  |  |  |  |
| **#3**: (verb)…  **TO ENRICH** a … |  |  |  |  |

**S.M.A.R.T. Goals** are: **S**pecific, **M**easurable, **A**chievable, **R**ealistic, and **T**ime-related

**MEMO**

**DATE:**  February 15, 2017

**TO:** All Participants

MURDOCK TRUST BOARD LEADERSHIP & DEVELOPMENT PROGRAM

**FROM:** John Pearson

**RE:** Strategic Plan Placemat – Template

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| On page 1 of 2, you’ll find the Word document template for what I call the **“Strategic Plan Placemat.**” I used this one with the Boys & Girls Clubs of East Texas on my first day of a two-day session on strategic planning with their CEO and senior team members. Visit this webpage for more information on the topics covered: <http://managementbuckets.com/workshops>  Obviously, this one-page summary document—ultimately—is the culmination of very hard, disciplined work with both the staff and the board. It’s the end result, not the beginning.  As I mentioned in our sessions, every strategic planning consultant/facilitator will use different tools to get you to the top of Mount Everest. But it’s important to let your facilitator use *his or her* own tools!  I like this tool—the Strategic Plan Placemat (11” x 17” in color) because it is often an excellent one page summary of the next three years.  To the right, you’ll see the process I often use with a client. The CEO appoints a “Champion” for each segment (based on the champion’s 3 Powerful S’s: Spiritual Gifts, Strengths, and Social Style)…and then the champion works with a small team or task force of 3 to 5 others. I have worksheets for each team—and the champions meet once a month, or so, in person or via video conference to update each other.  Again…these are my tools. We’ll plan to talk more about strategic planning during these board training sessions. Others have different and effective ways of discerning God’s direction for the future. Reminder:  **“Just because something is strategic does**  **not necessarily mean it is God’s will for us right now.”** *Pursuing God’s Will Together: A Discernment Practice for Leadership Groups*,  by Ruth Haley Barton  Read my review of her book:  <http://urgentink.typepad.com/my_weblog/2012/07/pursuing-gods-will-together.html>  P.S. You’ll find more resources (and…surprise…more BOOKS!) and downloadable worksheets in the relevant buckets here: <http://managementbuckets.com/20managementbuckets>   * Check out the Results Bucket, the Customer Bucket, the Strategy Bucket, and the Program Bucket. |  | **John Pearson’s Rolling 3-Year Strategic Plan Process and Schedule**  **GOAL:** Final Draft Submitted to Board by March 16, 2015 - Version 3.0 – Updated on Oct. 31, 2014   |  |  |  |  | | --- | --- | --- | --- | | **TAB** | **Strategic Plan Tasks** (generally completed in this order): | **Champion\*** \*Appointed on 9/16/14 | **1st Draft Deadline** | |  | **“Planning to Plan”** The 7 Reasons Why Strategic Plans Fail |  |  | |  | **The 5 Most Important Questions You Will Ever Ask About Your Organization** (Jan. 8 session) |  |  | | 4 | Mission, Vision, Values, BHAG |  |  | | 5 | Our Customers & What They Value |  |  | | 6A | Environmental Scan |  |  | | 6B | S.W.O.T. Analysis |  |  | | 6C | Trends (and Trendspotting Exercise) |  |  | | 6D | Assumptions (“The Radar Report”) |  |  | | 7 | Spiritual Discernment Process |  |  | | 8 | Three-Year Visionary Priorities (by dept.) |  |  | | 9 | Top-5 Goals for Year One |  |  | | 10 | Board & Senior Team Goals & Dashboards |  |  | | 11 | “Results Book” Excerpts |  |  | | 12 | Appendix |  |  | | 1 | Introduction |  |  | | 2 | Organization-at-a-Glance & Historical Snapshot |  |  | | 3A | Executive Summary |  |  | | 3B | The Rolling 3-Year Strategic Plan Placemat |  |  | |  | **SUPPLEMENTARY RESOURCES:** |  |  | |  | Customized Strategic Plan Versions (Board, Staff, Volunteers, Donors, etc.) |  |  | |  | ***HOOPLA!*** Celebration |  |  | |  | Update of Annual Planning Calendar |  |  | |