



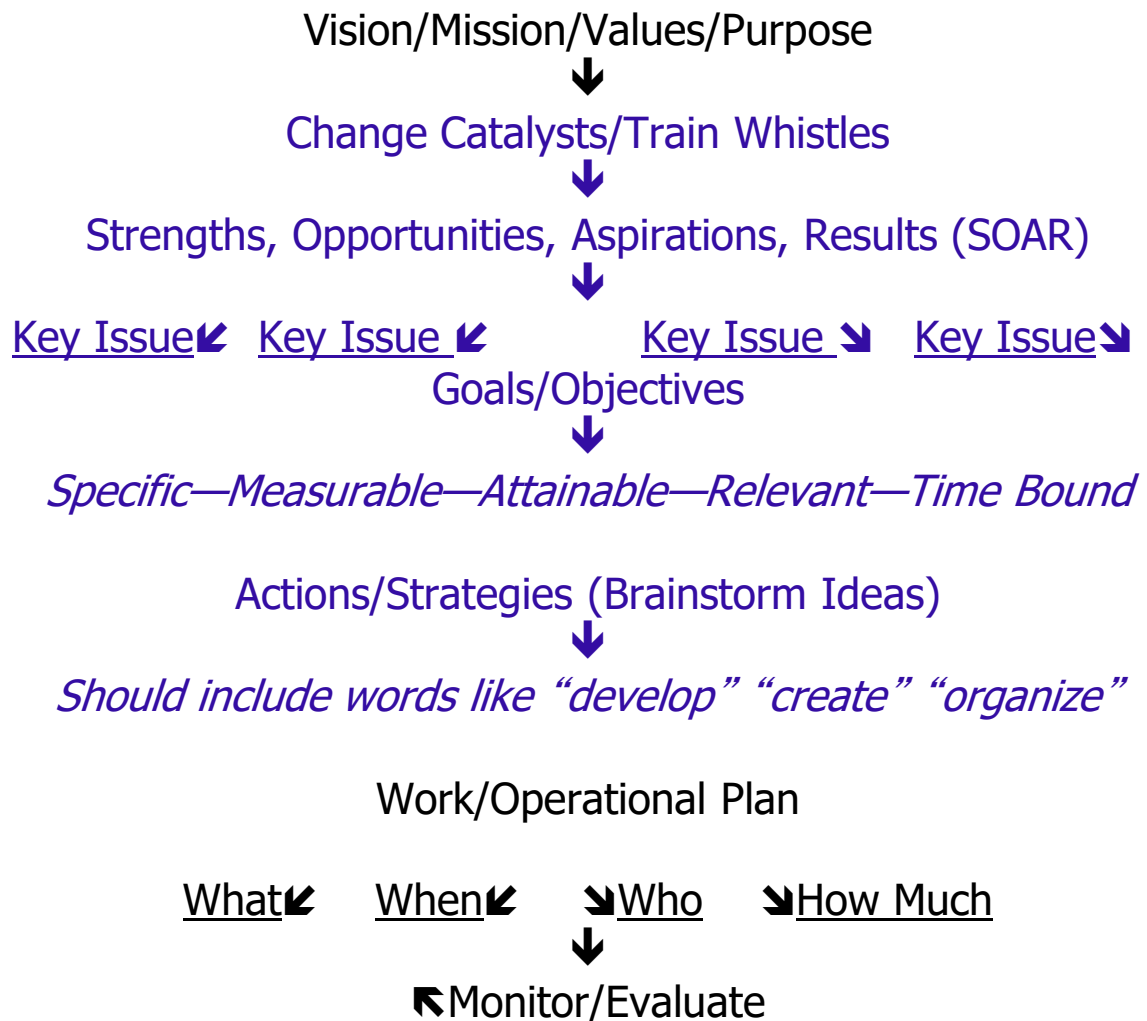
Strengths-Based Strategic Thinking Guide

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Strategic Thinking Process



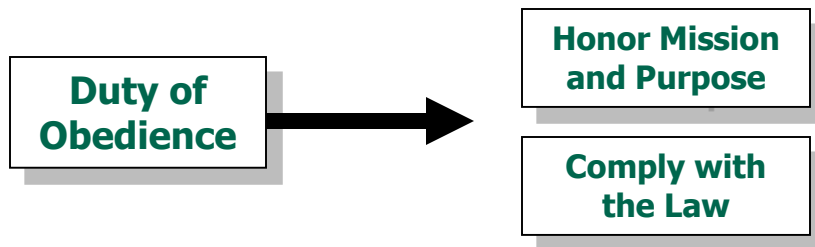


Strategic Responsibilities

Governing boards of organizations are expected to act (1) in good faith; (2) with the care any ordinary person in the same circumstances would exercise; and (3) in a manner that is in the best interest of the organization. These standards include these basic duties:

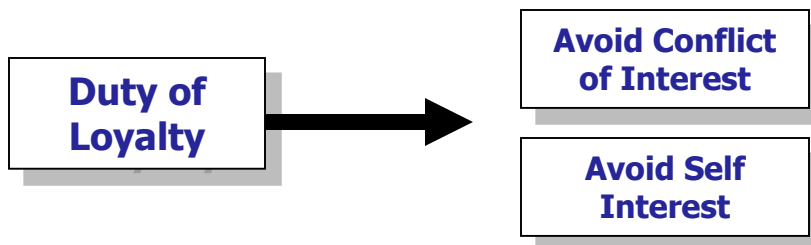
Duty of Obedience

The governing board of the organization must comply with state and federal law and conform to the organization's articles of incorporation and bylaws. This duty forbids acts outside the scope of corporate powers. Debate at the board table is expected and encouraged. However, the duty of obedience binds a director to support and implement decisions of the board once they are made.



Duty of Loyalty

Dictates that volunteers and directors must act in good faith and must not allow their personal interests to prevail over the interests of the organization. It requires that you refrain from using your position of trust, or information gained from participating on the board, to further your personal gain.



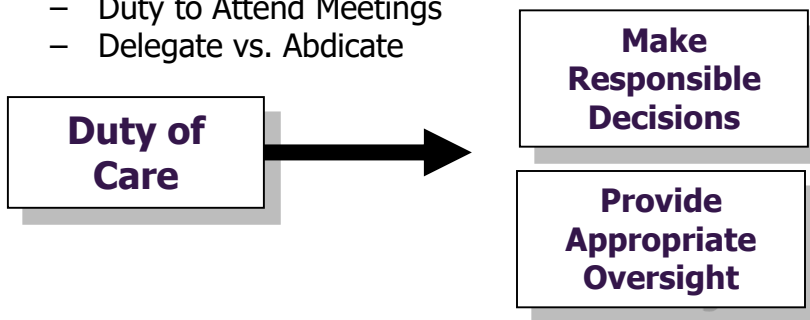


Board Strategic Responsibilities

Duty of Care

Requires volunteers and directors to be diligent and prudent in managing the organization's affairs. The individuals charged with governing must handle the organizational duties with such care as an ordinary prudent person would use under similar circumstances. Good faith and candid actions are the hallmarks of the duty of care.

- Other components to the Duty of Care include:
 - Duty to Stay Informed
 - Duty to Attend Meetings
 - Delegate vs. Abdicate



From George Webster & Hugh Webster, The Law Of Associations: An Operating Legal Manual for Executives & Counsel, ASAE, Lexis/Nexis.

Directors & Officers Liability Insurance



- Nonprofit Directors & Officers Liability insurance typically covers appointed and elected officers of a nonprofit for claims filed against them while acting within their official capacity as a volunteer.
- Always consult legal counsel for advice.



A **Vision Statement** (Desired End-State) is a short statement describing the clear and inspirational long-term desired change resulting from an organization or program's work. It clarifies why the organization is unique as well as purpose or cause.

Vision:

Is your vision forward-thinking? Does it answer the who, what or where do we want to be in the future?

A **Mission Statement** is a statement of the purpose of your organization. The mission statement should guide the actions of the organization, provide a path, and guide decision-making.

Mission:

Does your mission help others understand what you do and guide your decision-making? Can you share your mission with others easily?

Understanding the Why helps broaden the understanding of your organization. It clarifies what makes you unique and why you do what you do.

The Why:

Do you and your members understand why your organization exists? What makes it unique?

Recognizing Approaching Change

"Train Whistles Coming Down the Track"



***What Are You Hearing in the Distance?
What Can You See?
What is Glaringly Close?***

Change can be like a train coming down the track on which you are standing. You know it is coming and you know you must act before it gets dangerously close.

Organizations view these "trains" through different lenses. Perhaps the train won't arrive as quickly as they say. Perhaps we don't like the train. Perhaps the train will divert before it gets here. Sometimes those lenses prevent us from being proactive, putting us in the position of constant reaction.

Think about what outside influences might affect your chamber or association.

What changes in culture/society; economy/financial; technology/virtual; and regulations/legislation are "coming down the track"?

Recognizing Approaching Change

"Train Whistles Coming Down the Track"



***What Are You Hearing in the Distance for Your Organization?
What Can You See? What is Glaringly Close?***

Place these issues or items in the boxes below

<i>Culture/Society</i>	<i>Economy/Financial</i>
<i>Technology/Virtual</i>	<i>Regulations/Legislation</i>



Strategic Thinking/Planning Evolution

Why and How the SWOT Analysis was Created?

Strategic Planning as we know it developed over a number of years. Most of that time it was focused on problem solving. Terms like **Organizational Development** and **Action Research** described planning processes that were specifically focused on improving an organization's problem-solving capabilities. Common was a concentration on participants examining their present situation and deciding what required change or action. The focus on problem-solving continued as **SWOT Analysis** was introduced after World War II. Identifying strengths, weaknesses, opportunities, and threats, this process has been used for the past 55 years with little change.

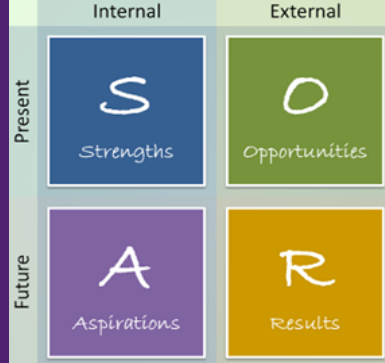
Why and How the SOAR Framework was Designed?

In 1987 David Cooperrider and Suresh Srivastva introduced a new process, **Appreciative Inquiry**, which was a strengths-based approach to organizational development and change. In 2003, the **SOAR Process** was introduced by Jackie Stavros and John Sutherland as a new framework for strategic planning that built upon the strengths-based appreciative inquiry approach.

Negative vs. Positive Thinking Spirals

Something to think about: Appreciative inquiry and the SOAR process are based on the positive and strengths. Problem-solving approaches tend to focus on the negative, which can bring the environment in the planning process down what is called a "negative spiral," sapping the energy of the participants. When the positive is emphasized the energy in the room increases, people are excited about new possibilities, and a "positive spiral" is created.

The SOAR Framework



- SOAR builds on the strengths of the organization and provides the framework for avoiding the downward spiral of negativity.
- Although a positive approach which seems to shun negativity, does not completely avoid addressing challenges. Reframes the negative issues into opportunities to create a strengths-based approach to the process.
- Aspirations and Results replace Weaknesses and Threats

SWOT

Internal Appraisal	Strengths Where can we outperform others?	Weaknesses Where can others outperform us?
External Appraisal	Opportunities How can we exploit the market?	Threats What or who could take our market?

SOAR

Strategic Inquiry	Strengths Our greatest assets	Opportunities Best possible market opportunities
Appreciative Intent	Aspirations Our preferred future	Results Measureable results

How does “Problem Solving” Differ from “Inquiry”?

Problem Solving (SWOT)

Strengths; Weaknesses;
Opportunities; Threats

- Focus: Past & Present
- Identifies Problem & “Felt Need”
- Analysis of Causes
- Analysis of Possible Solutions
- Action Planning
- Organization is a Problem to Be Solved

Appreciative Inquiry (SOAR)

Strengths; Opportunities;
Aspirations; Results

- Focus: Present & Future
- Identifies Aspirations
- Envisioning “What Might Be”
- Dialogue “What Should Be”
- Innovating “What Will Be”
- Organization is a Mystery to Be Embraced

Overview of Appreciative Inquiry

1. Invites us to consider the proposition that adopting an appreciative stance to organizational dynamics leads to *more innovative* and *long-lasting transformation*.
2. Narrative-based process of positive change.
3. Cycle of activity that starts by engaging all members of an organization or community in a broad set of interviews and deep dialogue about strengths, resources, and capabilities.
4. Moves people through a series of activities focused on envisioning bold possibilities dreams for the future.



BEST

Strengths-Based SOAR Framework

- **Strengths** — *What you do well? What do you do best? What are you excellent at?*
- **Opportunities** — *What are the opportunities that may or may not be within your control? Meaning – don't limit yourself.*
- **Aspirations** — *What do you aspire to become or do?*
- **Results** — *What measurable results do you seek to achieve? What are the outcomes to be measured from the aspirations?*

Strategic Goal Areas



Looking at your outside influences and your SOAR framework what strategic goal areas begin to emerge? Where do you want to concentrate your efforts? One three to four areas are determined, what describes those areas?

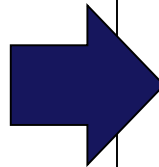
Examples of strategic goal areas are: "Advocacy: proactively advocate for our profession and those it affects." "Leadership: Be the trusted leader for the advancement and excellence in our profession."



Goals & Tactics

Writing Goals/ Objectives

What ...
do you want to do?



Goals may start with words like:

Increase
Encourage
Improve
Build
Expand
Introduce
Advance

Writing Tactics/ Strategies

How ...
will you do it?

Tactics may start with words like:

Form	Study
Develop	Resolve
Establish	Revise
Produce	Promote
Define	Coordinate
Request	Design
Determine	Create
Assist	Initiate
	Identify

Setting S.M.A.R.T.E.R. Goals

We have made SMART goals SMARTER by adding some excitement and rewards. SMARTER goals help you focus on your purpose, outcomes and direction. What needs to be done, what will the outcome be, and where are we going?

S Specific

Who, what, when, where?

M Measurable

How will you measure your progress? By when, how much, how many?

A Attainable

The more details in your goals, the more attainable they become. Strive toward reachable goals, and then continue the process and progress.

R Relevant/Realistic

Are you willing, able, and believe you can accomplish this goal? What conditions must exist to accomplish the goal?

T Time Bound

What is the time frame for this goal?

E Exciting

Is there passion behind the goal? What pushes one to achieve the goal?

R Rewarded

What is the end result? How will you recognize and reward along the way?



Sample Template for the Action Plan

Begin with this template. For each **Strategic Goal Area** write a **Goal** – the **what** you are going to do. Then write the **strategies** for achieving the goal – the **how** you are going to do it. Don't forget to include **who** (committee, task force, leader) will work on it and **when** it should take place.

Use the suggested words on the next page to guide you.

Strategic Goal Area:

Goal/Objective #1:

Actions/Tactics

1. _____
 Lead/Assigned to:
 Action due by:
2. _____
 Lead/Assigned to:
 Action due by:
3. _____
 Lead/Assigned to:
 Action due by:

STOP

What's on Your Stop-Doing List?

As you build a new plan, adding projects and initiatives, review what you do at present. What should you stop doing in order to add new goals and strategies to your plan?

Stop doing list:

1. _____
2. _____
3. _____
4. _____

What's on Your Start-Doing List?

START DOING

What do your new initiatives require? Are there different approaches, behaviors, or processes that should be considered?

Start doing list:

1. _____
2. _____
3. _____
4. _____

Our Core Strengths

- **Strategic Thinking/Planning**
- **Leadership Development**
- **Staff Retreats**
- **Communication Skills**
- **Facilitation Training**
- **Convention Breakouts**
- **Conference Keynotes**



Dr. Steve Swafford, IOM, Balance Warrior + CEO, has worked more than 30 years for and with non-profits, trade associations, and professional societies in areas of strategy, leadership development, communication, membership and executive management. He brings a practical knowledge of strategy and executive leadership with past organizations such as the National Association of Home Builders (NAHB), Club Managers Association of America (CMAA), and American Subcontractors Association (ASA) where he most recently served as the executive director. He is active in California Society of Association Executives (CalSAE) and American Society of Association Executives (ASAE) leadership serving on the Board of Directors; past Membership Committee Chair; past Professional Development Committee Chair (*aka Purple Cow Posse*); Southern California Regional Council; University leadership advisor; and volunteer staff pastor. Steve is also a 15-year faculty member for the U.S. Chamber of Commerce's Institute of Management and serves on the Curriculum Committee for the U.S. Chamber of Commerce. A native of Kansas, Steve has a B.S. in journalism from Kansas State University; a M.Div. from Wesley Theological Seminary in Washington, DC; and an Ed.D. from Pepperdine University's School of Education & Psychology focusing on Strategic Organizational Change. Steve is Full-Time Practitioner Faculty for Pepperdine University's Graziadio Business School and co-founder of Leadership Outfitters, LLC.

Dr. Jill McCrory, Ringleader + Co-Founder, has been actively involved in non-profit management for nearly 33 years in a variety of capacities. Jill was Senior Director of Training for nearly 15 years at the National Association of Home Builders (NAHB) working with volunteer leaders of an organization that had over 800 chapters/affiliates and a 2,000-member board of directors. As a co-founder of Leadership Outfitters, Jill has actively guided the strategic training and development programs for more than 1,000 nonprofit organizations. She has also served on a wide variety of nonprofit organizations and volunteer boards, including serving as the chair of a national advocacy organization and as a leader in a state organization. She was a member of numerous nonprofit committees and advisory groups for both the former Greater Washington Society of Association Executives (GWSAE) and the American Society of Association Executives (ASAE). She has served as faculty for the U.S. Chamber of Commerce's Institute of Management for many years. In October of 2017 she founded and launched a non-profit organization in Montgomery County, MD and linked this critical research with her Doctor of Ministry degree from Wesley Theological Seminary in Washington, DC