CREATING A LODGE VISION: PUTTING GOALS INTO ACTION

Session Length: 50 Minutes

Learning objectives:
- How to have vision
- Criteria for developing SMART goals
- Using Leadership Skills to implement these goals
- How to use the 6 steps of the Planning Model
- Putting it all together with a Vision Checklist

Required Materials:
- Flipcharts and Markers
- Power Point presentation file
- Computer & Projector
- Copies of the Action Checklist for distribution

TRAINER PREPARATION

The trainer should have experience working with large organizations. He should have some prior knowledge of the purpose, usefulness and workings of vision statements.

SESSION NARRATIVE

Advance PP Slide “Title Slide”

Trainer Tip: Welcome everyone to this session. Note that this slide can be customized with a Subtitle. Feel free to add your name here.

Advance PP Slide “Having a Vision”

“The very essence of leadership is that you have a vision – Theodore Hesburg

Advance PP Slide “What is Vision?”

- Something seen in a dream
- An object of imagination
- Seeing or something seen
- Having foresight

Advance PP Slide “Converting Vision into a Goal”

Order of the Arrow 15 – 1 Boy Scouts of America
Now that I have a dream … What Next?
How do I turn this into a goal?

**S – Specific**

*Trainer Tip:* What do we mean by Specific? Get ideas and then summarize with these points: A specific goal has a much better chance of being accomplished is you ask the 6 “W” questions. Who is involved? What do I want to accomplish? Where will it get done? When will it get done? Which requirements and constraints will I use? Why do I want to do this (Purpose & benefits)?

**M – Measurable**

*Trainer Tip:* What do we mean by measurable? Get ideas and then summarize with the following: How will we know that we have achieved the goal? Target Dates & deadlines. Objective not Subjective. Can it be charted for trends?

**A – Attainable**

*Trainer Tip:* What do we mean by attainable? Get ideas and then summarize with the following: Can we do it? Has the bar been set too high? Do we have the resources?

**R – Realistic**

*Trainer Tip:* What do we mean by realistic? Get ideas and then summarize with the following: Do you believe you can do it? Are we willing to work really hard to accomplish the goal? Are we able to accomplish the goal? Can we motivate others to assist us?

**T – Tangible**

*Trainer Tip:* What do we mean by tangible? Get ideas and then summarize with the following: A goal is tangible when you can experience it with all 5 senses – Taste, touch, smell, sight or hearing.

Use the pneumatic of SMART to help you remember the 5 elements when setting goals.

**Example**

- Lodge XZY has a pathetic newsletter
- It’s only 4 pages and lacks photos, graphics or other pizzaz
- Sporadically published
- Vision – Lodge Chief had vision after his election in November to make the newsletter the best in the Section
Lodge Leadership Development  

Session 15  
Creating A Lodge Vision – Putting Goals into Action

- Goal – Did it meet SMART? You better believe it!

In simplest terms, a leader is one who knows where he wants to go, and gets up and goes – John Erskine

- Rally support from the entire Lodge
- It will never happen unless you let them know what it is that you want to accomplish

- How about the Lodge Executive Committee?
  - Get them excited about the goal
  - Get their support first and then you can spread the word
  - Methods? Chapters, Webpage, Flyers, Phone, Email, etc.

**Trainer Tip:** Discuss: Take your message to Chapters – They always need programs! Get on the phone and gather support through Chapter Chiefs and their Advisers. Use email to quickly disseminate your information. Create a flyer to mail to key leaders describing what it is you want to accomplish.

- Having foresight

- Start early
- This will help to get the ball rolling
- Some things take longer to get approvals

- Be prepared!
- Gather all the facts that you will need
  - Especially if it involves money!

- The Lodge Chief from Lodge XYZ announced to the LEC in December what is goal was.
- Then in January at the LLDC, they had a brainstorming session to communicate this to the entire Executive Committee. They worked on items they wanted to see added to the Newsletter. And boy, did they come up with some super ideas!

A dream is just a dream. A goal is a dream with a plan and a deadline. – Elbert Hubbard

We will now examine in more detail the six elements that make up the Planning Model:

1. Consider the Task
2. Consider your Resources
3. Consider the Alternatives
4. Write the Plan  
5. Implement the Plan  
6. Evaluate

**Trainer Tip:** This model is very important. Therefore, so that the group can constantly see the diagram as you discuss each part, draw the model on a separate flipchart.

**Advance PP Slide**  
“Consider the Task”

Let’s begin with the first step of the Planning Model: Consider the Task. Here are some questions you need to ask:

- What needs to get done?
- When does it need to get done?
- Who is going to do it?
- Where will all this happen?
- How is it going to get done?

**Advance PP Slide**  
“Consider your Resources”

Let’s take a little time now and talk about the second step of the Planning Model: Consider your Resources.

**Very Important Step**

What are Resources? (Get the group to come up with a definition)

- Time
- Money
- Skills
- Equipment

Make a list  
Start recruiting  
Must communicate the vision to others!

**Advance PP Slide**  
“Example”

- Lodge XYX had several talented folks within their lodge that knew how to make a Word Processor really function. They got them involved early on and made sure that they understood what they were trying to accomplish.  
- They then looked at examples of other Lodge’s newsletters off the Internet looking for example. They then worked on developing a new masthead and got some price quotes from several printers. These samples were promoted at the LEC and approval was obtained to move forward.

**Advance PP Slide**  
“Consider Alternatives”

- This is your “Plan B”.  
  - Don’t just consider one way  
  - Get several options
- Emergency Procedures
- Think “Outside the Box”  
  - Be creative!  
  - Build off other’s ideas  
  - Nothing is stupid or dumb!
- Sometimes your Plan B might be better than the original Plan

**Advance PP Slide**  
“Write the Final Plan”
Why should it be written?
What items to include?
Who gets copies of the plan?
When should it be written?

As mentioned earlier, Lodge XYZ obtained several quotes to print the new masthead. These would cost $600.00 for the year. In addition, they obtained quotes for printing a 12-page newsletter, which would run 85 cents per person.
Therefore, the LEC had to approve an increase in dues from $6.00 to $9.00 to cover these expenses. Alternatives were considered in that they obtained several quotes to find the best deal.
Plan was written so that timetables were established with respect to making sure that an issue would go out each quarter. These deadlines were then communicated to the entire lodge at the LLDC.

Too often, great plans are drawn and then never followed!
So let’s do it!
Refer to the written plan often
Communicate, Communicate, Communicate
Follow-up and Follow-through

Even though this is listed last, Evaluation is a continuous process
Why do we evaluate?

**Trainer Tip:** Let group come up with some answers. Summarize with the following:
- To set and maintain standards
- To improve performance
- To motivate

Questions to ask:

**Trainer Tip:** These six questions are very important. To encourage note taking, have these written on a flipchart:
1. Are we getting the job done?
2. Are we doing it right?
3. Are we on schedule?
4. Is everybody involved?
5. Are we working well and satisfied with what we are doing?
6. Do we want to continue?

Helps to keep the plan on track
Can assist in group’s understanding of the Plan

Lodge XYZ entered their “New & Improved” newsletter at the Section Conclave that April
They finished 2nd.

When they got it back, there were numerous comments that helped them continue to improve their newsletter.

- Keep in mind when working your goal

**Trainer Tip:** Talk about the fact that people are interesting animals. You have to factor in their Characteristics & Needs when you are trying to reach your goal.

- What is a Characteristic & Need?

**Trainer Tip:** Let the group try to define these two terms. Then you can write these definitions on a board or flipchart:

- Characteristic – A trait or quality distinguishing a group or individual
- Need – A want or requirement

- Why is this important?

**Trainer Tip:** Let the group try to come up with some answers. Summarize with the following:

You have to know what makes your people tick. Furthermore, you have to know which individuals you can count on and which ones you will have to motivate. It is important to understand ourselves. Helps you understand about being sensitive to others and their needs. Must maintain a balance.

- Lodge XYZ understood the need for more photos to appear in their newsletter. In fact, this idea came out of the brainstorming session at LLDC.

- Why the need for pictures?

- Another item that this influenced was the content of the articles and actually started regular features such as:
  - Game Corner (Need for youth to have fun)
  - Cook's Corner (This Lodge loves to eat!)
  - Where to go Camping (Need to promote camping)
  - Craft Corner (Need to promote Indian Affairs)
  - Patch Trading Corner (Need to keep members interested)

**Do what you can, with what you have, where you are, and do it now!** – Theodore Roosevelt

As a leader, you have to realize that getting things done will require the help of others. Here are several styles of leadership that can assist you in getting a goal realized through the help of other lodge members:

- Persuading (Selling)
Trainer Tip: This style is used in getting the group to agree with what the leader wants done. It encourages the group’s enthusiastic participation. Communication skills are very important when using this style.

- Consulting

Trainer Tip: Use this style to get the group’s ideas (Such as brainstorming sessions). It will continue to reinforce the group’s participation since they feel they are contributing. This style ensures that the group’s desires are represented.

- Delegating

Trainer Tip: In this style, the leader must now trust his subordinates to carry it out (Share the load). The key to this style is the word trust. It is at the very center of this style. It ensures that the group is fully involved and will assist in building experience. It builds maximum enthusiasm for the task.

The Lodge Chief realized that this was indeed going to be a very challenging goal and began early by practicing these leadership styles.

- He first had to sell the lodge on his goal.
- He consulted with them in the brainstorming session at LLDC to get ideas.
- Next he turned the goal over to his Vice-Chief of Publications, his Adviser, and the other talented people to begin work on retooling the newsletter

Trainer Tip: Take some time to review the Checklist. Use both a blank Checklist and then one that has been filled out to show how this can be used in working the goal.

- Breakout session to practice

Trainer Tip: Now that you have discussed the checklist and how it can used, divide your group up into buzz groups of 8-10 people per group. Give them 10 to 15 minutes to fill in the checklist. As time permits, let several of the groups make reports.

Leadership is about Vision
- Set Challenging, Meaningful, Attainable & Measurable Goals (CMAM)
- Communicate, Communicate, Communicate
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- Use the Planning Model
- Understand Characteristics & Needs
- Share Leadership
- Use the Vision Checklist
- Don’t ever Give Up!
- Good Luck!

APPENDIX: FREQUENTLY ASKED QUESTIONS

APPENDIX: POWERPOINT SLIDES
Lodge Leadership Development Session 15 Creating A Lodge Vision – Putting Goals into Action

Example

Sharing Leadership

Styles of Leadership

Use the Vision Checklist

Conclusion

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The following is a recommended list of flip chart pages that can be used for visual presentation.

**Putting Goals Into Action**

Your Name

**Having a Vision**

The very essence of leadership is that you have a vision.

Theodore Hesburg

**What is Vision?**

- Something seen in a dream
- An object of imagination
- Seeing or something seen
- Having foresight

**Converting the Vision into a Goal**

- Now that a dream has hatched … What Next?
- How do I turn this into a goal?

**Criteria for Goals**

- S – Specific
- M – Measurable
- A – Attainable
- R – Realistic
- T – Tangible

**Example**

- Lodge has pathetic newsletter
- Only 4 pages
- Sporadically published
- Vision
- Goal

**In simplest terms, a leader is one who knows where he wants to go, and gets up and goes.**

John Erskine

**Communicate**

- Rally support from entire Lodge
- It will never happen unless you let them know what it is that you want to accomplish!

**Where to Start?**

- How about the LEC?
- Get their support first and then you can spread the word!
- Methods? Chapters, Webpage, Flyers, Phone, etc.
**When?**
- Start early
- This will help to get the ball rolling
- Some things may take longer to get approvals

**How?**
- Be prepared!
- Gather all the facts that you will need.
- Especially if it involves money!

**Example**
- Lodge Chief announces goal
- Brainstorming at LLDC
- Came up with super ideas!

**Planning**
A dream is just a dream. A goal is a dream with a plan and a deadline.

Elbert Hubbard

**The Planning Model**
- Consider Task
- Consider Resources
- Consider Alternatives
- Consider the Task
  - What needs to get done?
  - When does it need to get done?
  - Who is going to do it?
  - Where will this happen?
  - How is it going to get done?

**Consider Resources**
- Very Important Step
- What are Resources?
- Make a list
- Start recruiting
- Must communicate the vision to others

**Example**
- Talented folks
- Got them involved
- Looked at examples
- New Masthead
- Got price quotes

**Consider Alternatives**
- This is your “Plan B”
- Emergency Procedures?
- Think “Outside the Box”
- Sometimes Plan B might be better than Original Plan
Write Final Plan
- Why should it be written?
- What items to include?
- Who gets copies of the Plan?
- When should it be written?

Example
- Print Masthead - $600
- 12-page Newsletter - 85¢
- Dues Increase
- Deadlines established

Put Plan into Action
- Too often, great plans are drawn and then never followed!
- So let’s do it!
- Refer to written plan often
- Communicate, Communicate, Communicate
- Follow-up & Follow-through

Evaluate
- Even though listed last, it is continuous
- Why do we evaluate?
- Can assist in group’s understanding of the Plan

Questions to Ask
- Getting job done?
- Doing it right?
- On schedule?
- Everybody involved?
- Working well together & satisfied?
- Want to Continue?

Example
- Entered “New & Improved” newsletter at Conclave
- Finished 2nd
- Used evaluation comments to continue improvement

Characteristics & Needs
- Keep in mind when working your goal
- What is a Characteristic & Need?
- Why is this important?

Example
- Need for more photos
- Why need for pictures?
- Content of articles
  - Game Corner
  - Cook’s Corner
  - Where to go Camping
  - Craft Corner
  - Patch Trading

Sharing Leadership
Do what you can, with what you have, where you are, and do it now!

Theodore Roosevelt

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Styles of Leadership
- Persuading (Selling)
- Consulting
- Delegating

Example
- Lodge Chief realized this was challenging
- Began early practicing these leadership styles
- First had to sell the lodge
- Consulted with them in brainstorming session
- Delegated to VC of Publications and others

Conclusion
- Leadership is about vision
- Use CMAM for Goals
- Communicate!
- Use the Planning Model
- Characteristics & Needs
- Share Leadership
- Vision Checklist
- Don’t ever Give Up!

Vision Checklist
APPENDIX: SOURCE MATERIALS AND RESOURCES

2003 – 2007 Order of the Arrow Strategic Plan
   http://www.oa-bsa.org/programs/splan/

2003-2007 Order of the Arrow Strategic Plan & Annual Lodge Plan Workbook
   Presented at the National Council of Chiefs at the 2002 National Order of the Arrow
   Conference