

Talking Points to Accompany the **PLANNING FOR SUCCESS** Powerpoint.

These talking points are formatted in WORD with a font size that makes it easy to read them in front of an audience, or in a darkened room where you simultaneously play the Powerpoint. Feel free to reduce the size of the font in order to print it out just for review or sharing, or increase the font size to make it easy to read aloud.

(TITLE SLIDE 1)

ADVANCE PLANNING

SWOT Process to Choose & Prioritize Options and NEXT STEPS

PLANNING for Success is important whether you are an at-large member planning a single action or event in your community, or a branch planning an action... or discerning the best way forward to strengthen and keep your branch visible and effective.

(SLIDE 2)

Planning For Success is a big focus for the Program Committee for the next 2 -3 years, and probably beyond.

Issue Committees will use their goals to develop a MENU of **ACTION OPTIONS** that reflect their priorities. The public, branches and members will be asked to engage with 1-3 of these actions between now and 2022.

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By May 2020 Program Committee will meet to invite at-large members and branches to meet....discern which of this MENU OF ACTION OPTIONS might hold interest for your community... and do some long range PLANNING to see how you might launch one or more of these suggested WILPF actions.

So you can see that Advance Planning will play more and more of a part of WILPF's strategy to stay visible in your community.

(SLIDE 4)

Planning at every level of WILPF makes it possible to include more volunteers, more allies, more media and more arts programming to attract different segments of your population. It also allows time to seek outside funding for expenses you predict in launching your project. In that way we're inviting you to use your imagination and local experience to think a little bigger and plan for a WILPF-sponsored action.

THIS TRAINING for long term projects aims to make you acquainted with a discernment process and a planning process you can use once or make it part of regular calendar plans.

The SWOT Analysis process is used in both businesses and in non-profits ... anywhere planning helps increase success, however you measure that.

If you have questions at the end of this training, please direct them to 1wilpfcalls@gmail.com.

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A SWOT analysis is an incredibly simple, yet powerful tool to help you develop your organizational or branch strategy, whether you're a startup branch, a rebooted relaunched branch, or you're just trying to improve your planning in an existing branch of WILPF. It can also be effective for at-large members who want to plan an action and take advantage of community allies to make it work.

SWOT stands for **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats.

(SLIDE 6)

Strengths and weaknesses are internal to your branch—things that you have some control over and can change. Examples include who is on your team, your resources and materials, your location, meeting place, mailing list, list of friends and allies.

(SLIDE 7)

Opportunities and threats are external—things that are going on outside your branch, in the larger community. You can take advantage of opportunities and protect against threats, but you can't change them. Examples include competing organizations who may have attracted some of your former members, a fuzzy image in the community and fewer women who have time to do the hard work of organizing actions and events.

(SLIDE 8)

Even though this process is simple, it can have dramatic benefits if you use it to do more LONG RANGE planning. When you weigh a list of ACTION OPTIONS you can use SWOT analysis to help you choose **which ACTIONS** will make you more visible in the community ...and have the greatest chances of success.

An analysis like this helps you prioritize and choose among many options.

It helps you visualize your options, your limits, and your way forward.

A SWOT analysis helps you organize your top strengths, weaknesses, opportunities, and threats into an organized list and is usually presented in a simple two-by-two grid.

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Here's what the SWOT GRID looks like.

You'll need a very large GRID like this you can post on a wall or draw on a white board.

And you'll need a calendar that covers the next 24 months.

When you take the time to do a SWOT analysis, you'll be armed with a solid strategy for prioritizing the work that you need to do to grow your branch or plan a successful action.

(SLIDE 10)

You may think that you already know everything that you need to do to succeed, and all you need is more hands on deck. But a SWOT analysis will force you to look in new ways at your challenges and opportunities, your community and allies... and from new directions.

You'll look candidly at your strengths and weaknesses, AND how you can leverage those to take advantage of the opportunities and threats that affect your planning and effectiveness.

(SLIDE 11)

Who should do a SWOT analysis?

For a SWOT analysis to be effective, branch leaders need to be deeply involved. This isn't a task that can be delegated to others. But, leadership shouldn't do ALL the work on their own, either. This is intended to be a democratic process where your members agree on the goals and the process.

For best results, you'll want to gather a group of people who have different perspectives on the branch. Select people who can represent different aspects of your community.... A few older less active members... who have a sense of history and some newer younger members...

(SLIDE 12)

Even stable allies who have stood with you on important issues can be invaluable as you work through your discernment process... for an action/event, or to reenvision what your branch can be.

Everyone should have a seat at the table and a voice.

Don't worry that 'outsiders' are going to set your strategy.

It's **your** leadership that will eventually develop a plan that fits your own needs.

In the most innovative instances of SWOT analysis, those OUTSIDE ALLIES can be really helpful in looking at the facts that you might not see on your own. They can help pinpoint your challenges in a way that, well... challenges you. They might also be able to see some opportunities that have been invisible to your members who only see the status quo.

(SLIDE 13)

If you're starting a new branch...or you are an at-large member trying to plan an ACTION... you can still do a SWOT analysis.

Recruit additional points of view from local friends, allies and activists ...who know **a little** about WILPF and **a lot** about your community.

It can help you identify some bold actions that might build a new branch over time....or just make isolated WILPF actions more successful.

A good SWOT analysis can help you start off on the right foot ... and clarify the goals of the work... right from the beginning.

The key is to have different points of view represented.

Existing branches can use a SWOT analysis to assess their current situation... and determine a strategy to move forward. But, remember that things are constantly changing and you may want to reassess your strategy, starting with a new SWOT analysis perhaps every year ...or every other year ... maybe at PLANNING RETREAT.

(SLIDE 14)

So... how do you do a SWOT analysis successfully?

You'll want to gather that diverse team of people we described already to work on a SWOT analysis.

A good SWOT analysis should not take all day. But it could be part of a larger planning retreat or meeting ... where you analyze the results and try to use them to advance new plans.

One or two hours should be more than plenty for SWOT analysis. If you'd like to add a social component, break up the work with refreshments at the halfway mark.

Gather people from different parts of your community and your branch with varied perspectives and experiences. Don't just send an email invitation. Invite the people you want to participate to be there in a very **personal way** to be there and be part of your longer range planning. Let them know THEIR particular perspective is important to include.

You'll find that different groups and individuals will have entirely different perspectives that will be critical to making your SWOT analysis successful.

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It's a good idea to have **one person facilitate the process.**

They don't even need to be a member to do this. It might even be better if they aren't so all your important branch voices can concentrate on the content... not the process.

Your facilitator could be anyone with experience facilitating meetings ...who's willing to help you with this analysis ...and who is trustworthy. The process makes facilitation easy.

You are creating a safe space where what people say is confidential.

Select a NOTE TAKER: someone who has good clear handwriting. You might want to post the notes around the room on large planning sheets.

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You might want to **establish some basic ground rules...** especially if you have new people joining you.

- For instance, any crazy idea can be suggested without criticism.

- No one will take criticism of the situation personally and it should be framed gently.
- If anyone wants to speak they should raise their hand to get on a stack
- Another person, besides the facilitator should keep track of the stack, and inform the facilitator who is on the stack.

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Doing a SWOT analysis is similar to brainstorming. Start with a **centering exercise**.

STATE YOUR GOALS for doing the exercise, to remind everyone why they're here and what you are hoping for at the end of the process.

Explain about the SWOT analysis, Strengths, Weaknesses, Opportunities and Threats as they relate to the specific goals you are laying out... a new long term project? ...an event you want to plan? ...a different clearer direction for your branch?

Give everyone a **pad of sticky-notes** ...and have them take time to quietly writing down ideas on their own about the specific Strengths, Weaknesses, Opportunities and Threats of your branch or of the projects you are choosing. Have them be honest and tell them their input is important and confidential. Allow about 10- 15 minutes for this.

Starting off with this independent activity helps people CENTER their thoughts but avoids 'groupthink'... and it ensures that all voices and ideas, even unpopular ones, are heard.

After 10 to 15 minutes of private brainstorming, **put all the sticky-notes up on the wall on your SWOT Grid**, separating them by the GRID designations.

This visual helps people really SEE where you are.

Visually you can see how many opportunities you have.... And how many threats.

The next step is to **find and group similar ideas together**.

Read aloud through ALL the sticky notes in each grid.

Are there duplicates? If so, pare down.

If 7 people said capacity or low membership was a Threat, maybe allow ONE sticky note to represent that. Be careful not to purge variations on that theme that might have other shades of meaning and germs of other ideas.

Take a few minutes to allow anyone to add additional notes at this point ... in case someone else's idea sparks a new thought or suggests a new post-it note.

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Once all of the ideas are organized, it's time to prioritize the ideas.

One way to make sure everyone gets equal opportunity is a voting system where everyone gets five or ten "votes" that they can distribute in any way they like.

Colored **Sticky dots** are useful for this portion of the exercise.

Everyone gets the same number of each color dots. Instruct folks to put their dots on the ideas that have the most energy for them.

Based on this voting exercise, you should end up with a prioritized list of ideas in each of the categories of your SWOT. Have someone read the top choices aloud.

No that you have priorities listed, of course, the list is now up for discussion and debate.

If you have invited outsiders to participate in this process, good for you!

Give everyone a chance to comment on the ideas with the most votes.

At this point is a good time to have a refreshment break.

Use the time to socialize, get to know one another better, make introductions, and remain positive about the process.

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As soon as you regroup, after refreshments... you'll need to discuss the priorities among yourselves.

Thank the outsiders for their time and contributions to the process. Explain they are free to leave and you'll keep them informed of any decisions you make.

(SLIDE 20)

Refreshed... and with some good networking time to clear your heads...

it's time for your leadership and members to continue meeting ... and review the information that was offered. More discussion, hard questions, and honest evaluation comes during this part of the process.

Once everyone has had one or two chances to speak, it's a good idea to close this part of the meeting and thank your members for their input. The members either leave, or move on to a different part of the planning retreat or planned agenda.

Once they leave, the leadership of the branch needs to debrief for a bit **right then**, while they still have the SWOT graph in front of them.

How did it go?

What surprised you? What excited you? What scared you?

What ideas do you have now that you didn't have before?

Did you identify any next steps? If so, who will do what?

And importantly... **how soon can you get back together** to keep working on this?

Someone should be responsible for photographing the SWOT graph and all the sticky notes in each quadrant.

If your SWOT exercise was part of a larger planning retreat event, you might want to continue this Phase 2 leadership Analysis while the rest of your members work on something else.

Then circle back to them later in the day with results.

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If it's NOT part of a larger planning retreat event, depending on your time availability, you should plan to meet again as soon as possible, while all the information is still fresh in your mind. Hopefully within 2 weeks.

Bring the SWOT graph photo, and the notes from your first session along with the 24 month calendar. If there are items that need to be done quickly, who will do them? Make assignments or volunteer for tasks. It's probably a good idea for someone to write thank you letters to the outside allies who participated in the first phase of your SWOT process.

This is the time when leaders meet privately and use the ideas your members and allies contributed and the SWOT planning so far, to hammer out a **possible choices and strategies**.

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When you meet again, center yourselves by **intentionally recalling your original goals for pursuing this process**. What did you hope to accomplish?

Remind yourselves of the answers you gave to the final questions at the end of the last time you gathered.

How did it go? What surprised you? What excited you? What scared you?

What ideas do you have now that you didn't have before?

Now the branch leaders are ready to use the ideas to prioritize strategies you want to recommend, based on the results of your SWOT analysis.

Look at your strengths and Opportunities.

What projects or actions need to be taken as Next Steps?

Have you added any? Eliminated any?

Look at your weaknesses and threats.

What measures could reduce those or convert them into opportunities?

Are there any that are simply too weak to pursue right now?

Put those on a 'parking lot' and keep them for the next time you schedule a planning meeting.

(SLIDE 23)

What you do you next really completes the process.

With your SWOT analysis complete....your leadership task is to analyze and distill the various perspectives that you gained... and get ready to convert it into real strategy you'll propose to your membership. After all, the exercise is about producing a strategy that you can work on during the next few months.

How you can use your strengths to take advantage of your opportunities and counter any threats?

Use this analysis to produce a list of actions that you can take to move forward.

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Then with your action list in hand, **look at your PLANNING calendar for the next 18 to 24 months and start placing goals** (or milestones) on it. What do you want to accomplish in each calendar quarter (or month) moving forward?

In addition to countering internal weaknesses with external opportunities ... can you also minimize your weaknesses to avoid the threats?

What actions will be necessary to do that? You'll develop another action list that you'll want to prioritize and schedule.

(SLIDE 25)

Together, using the SWOT input, branch leaders should be able to make the final call on proposing 3-5 ACTION priorities for your branch within a set timeline... maybe 6 months or as long as 18 months.

Remember **you've already consulted a sampling of your members** to round up ideas. And before you finalize your plans, you'll take your plans back to your members to make sure everyone is on board. **You're looking for BUY-IN.**

(SLIDE 26)

At your next member meeting, present your chosen priorities and action plans as positively as you can. Review the SWOT process that convinced you these were the priorities for the time period of up to 18 or 24 months. Ask the members who participated in the SWOT process to speak about the process and lend credibility to your choices. Stress the REASONS you chose the project or goals.

As leaders, it's your job to lay out a plan ...your proposed time table, the human and financial needs you foresee for success... and ask for buy-in on those ACTION priorities... Ask for volunteers to help reach your goals. If your members agree to your plans, ask for volunteers to help, start to make assignments and plug in volunteers who have specific skills to bring.

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WHEN DO YOU GO BACK TO THE DRAWING BOARD?

If you run your idea up a flag pole and no one salutes, you may have to tweak your plan, or even return to your Phase 2 SWOT planning group to start again, looking again at the analysis. But don't throw out the baby with the bathwater.

Begin again with the input you gathered at the SWOT gathering. And then start rearranging your plan to get buy-in. **Your goal is to get agreement within your cohort on WHAT to do, and HOW to do it, over what period of time.**

Even with delays, you'll still be so much closer to agreeing on specific ACTIONS you or your branch can take... and decisions you can share with the Program and Issue Committee leaders of WILPF US!

They'll be looking for your priorities and for regional and national synergies among the priorities of ALL the branches and at-large members, to collaborate or share resources whenever possible.

We've explained this SWOT process in terms of looking at how to strengthen your branch ...or maximize plans for a specific event or action.

The same process can work well to evaluate, select and prioritize from the WILPF US Program **MENU OF ACTION OPTIONS**. Program is requesting that branches and at-large members choose 1-3 actions over the next 24 months to plan and execute in your community.

(SLIDE 28)

To summarize, **let's go back and summarize the steps involved.**

1. Gather the questions or options you want to look at.... Either you are choosing from a list of possible ACTION OPTIONS for a long range project, or you are identifying long range steps for strengthening your branch.
2. Gather the people who represent a cross section of your branch and community, so you bring a wide perspective in the analysis. Clearly state the purpose of the meeting so everyone is on the same page.
3. Give everyone post-it-note pads and ask them to spend a few minutes thinking about and writing down STRENGTHS, WEAKNESSES, OPPORTUNITIES and THREATS for either you branch as a whole, or for the EVENTS or ACTIONS you are looking at launching.

(SLIDE 29)

4. Have them place their post-it-note ideas in the quadrants of the SWOT grid.
5. Read the post-it-notes aloud and remove any duplicates.
6. NOTICE where the most energy is in each quadrant.
7. Rank the comments with the highest priority... by voting... using color dots to further identify where the energy is. You are drilling down into the details.
8. Discuss the pros and cons of the priorities you voted on ... seeking consensus or majority agreement. Make sure everyone expresses their opinions.
9. Celebrate your progress so far with a Refreshment Break. Thank and excuse the outside allies who helped with the process.

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10. The leaders and insiders regroup... to think about the input you've gathered and the process so far. Make sure everyone has a chance to speak.
11. As soon as possible, either immediately or within 2 weeks, the leaders meet again, to analyze the feedback and the priorities the group has set
12. Reminding themselves of the goals of the process, the leaders identify the direction that holds the most promise and possible NEXT STEPS (towards choosing ACTIONS to launch or STRATEGIES for strengthening the branch).
13. Leaders place their next steps into the planning calendar for the next 18-24 months, allowing plenty of time for planning and building capacity.
14. Leaders present their plan to the full membership as positively as possible, explaining the process and reasoning.... and seek approval and buy-in from the members. Depending on response, tweak the plan if necessary or go back to step 9 to readjust the strategies.

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Are you confused? Let's look at a tangible example of a SWOT analysis.

We'll use a business plan... but the steps are similar.

UPer Crust Pies, a specialty meat and fruit pie cafe in Michigan's Upper Peninsula wants to improve their business model to get more customers. They sell hot, ready-to-go pies and frozen take-home options, as well as an assortment of fresh salads and beverages. Don't let the different 'business model' throw you. There are lessons we can learn here.

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The company is planning to open its first location in downtown **Yubetchatown** and is very focused on developing a plan that will give them success and make it easy to expand quickly for franchising.

Here's what **THEIR** SWOT analysis might look like:

Here's the way their graph looked after the Pie Company arranged their sticky notes and prioritized them.

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Let's look at the process they used....and the strategies for growth that they were able to come up with after they looked closely at their SWOT analysis.

Let's see how THEIR NEXT STEPS might translate into strategies and actions for WILPF.

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THEIR NEXT STEPS include:

1. **Investigate investors.** UPer Crust Pies might investigate its options for obtaining capital.

For WILPF branches or at-large members our 'capital' is our local support. Build it by approaching opinion leaders... or influential local progressive women in face-to-face meetings. Ask them for help, either short term for a specific project, or long term to support your branch. Introduce them to WILPF's long history ...and the potential we have to organize women for action and make a difference in your community. Ask them candidly for issues where THEY are most invested. Explain how their help to support your planned action, or to get you launched, or relaunched could support the issues they support.

2. **Create a marketing plan.** Because UPer Crust Pies wants to execute a specific marketing strategy—targeting working families by emphasizing that their dinner option is both healthy and convenient—the company should develop a marketing plan.

For WILPF maybe your 'goal' is younger working women or newly retired women. Where would you find them? How could you go to THEM?

3. **Plan a grand opening.** The town is growing. That's an opportunity. And a key piece of their marketing plan will be the store's grand opening, and the promotional strategies necessary to get UPer Crust Pies' target market in the door.

For your WILPF branch, perhaps a social event that gets people in the door, offers them a fun way to learn about WILPF and your branch... the more people understand the unique aspects of WILPF's solidarity, international connection, UN consultative status, long history and potential to support and train local activists.... The more they'll see the value in your branch and your projects.

With your goals and actions in hand, you'll be a long way toward completing a strategic plan for your branch, along with a calendar, timetable and some assignments for members.

(SLIDE 36)

It's easy to focus on the reasons this process might not be successful. The most popular one is certainly true: *"We don't have enough people to make this work."*

But look at the opportunities your SWOT process uncovers. SOME organization is going to be taking advantage of those. Why not WILPF?

The fact is we have no choice but to plan for a more sustainable future... to continue the good work of our founders ... and your branch founders.... and to combat the horrific attacks on women, people of color, the homeless, war profiteers, water despoilers, food poisoners...

We have an imperative to stay visible and committed and to model good organizing in our communities. There are new women moving into your community, or reaching a point in their lives where they have the time and feel the need to ACT. They are consciously or unconsciously looking for an 'activist home'. How will they find you? How will they come to understand the potential WILPF has to support one another and work for real change?

This is a PLANNING PROCESS which can help you identify and reach important strategic goals. Even if there are only 2 or 3 of you to begin with, you can still have success, by inviting allies to help you plan, by connecting with progressive women with influence, by asserting the potential WILPF has to help train new activists and organize seasoned activists. by **having** a plan, by staying **focused** on your plan, and by moving forward with accountability on a **timetable** that makes sense for YOU – over 18 to 24 months.

We've been empowering women to create the vision of the world we want since 1915. There are projects in your community that will benefit from WILPF's support and leadership. Good luck moving closer to your goals, whatever they may be!