

## **Training Title**

*Strategy: How to Think and Plan Strategically*

## **Indianapolis Facilitator**

*Janet Hauter (Chicago, IL)*

## **Goals**

- Understanding what strategic thinking is
- What does strategic thinking/planning have to do with VOTF?
- Actions and the strategic approach---begin with the end in mind.
- Steps in the process: learning to use a worksheet
- Understanding an action through a case study

## **Agenda**

Welcome, Opening Prayer	(5 min)
Overview of Goals, Agenda	(5 min)
Developing the Long View to Solve a Problem: Steps in the Process	(15 min)
It's Really All about Power Anyway!: Definitions	(5 min)
A Strategic Plan of Action and Key Steps/Critical Behaviors	(15 min)
Evaluation, Closing Prayer	(5 min)

## **Supplies**

Easel, flip chart paper, markers, tape, strategy visuals (see handout)

## **Handouts**

Key Steps and Definitions, Strategy Visuals

## Facilitator's Notes

### Welcome, Opening Prayer (5 min)

#### Prayer

Let's take a moment to center ourselves in the presence of our brother Jesus Christ. As two or more, we gather in His name. As He promised, so we believe in His presence among us. We ask our parent God to send us His Spirit to guide our every word and action here today toward our Savior's vision for the community He left behind, and continues to embrace, as we embrace His Presence among us. Amen. *-IL affiliate member*

### Overview of Goals, Agenda (5 min)

### Developing the Long View to Solve a Problem: Steps in the Process (15 min)

#### Steps in the Process

Focus on the Shared Vision/Mission  
Be informed  
Begin with the end in mind  
The Strategy Chart (see handout)  
Elements of a Strategy: The Target, the goal, the timing, the tactics  
Create a decision making model  
Develop scenarios to make strides toward the goal  
Enlist commitment of stakeholders

### It's Really All about Power Anyway!: Definitions (5 min)

**Strategy:** how you leverage what you have to get what you want; how to best use your resources to realize your goals; strategizing involves building your own power in order to close the power differential

**Goal:** Goals are measurements of success or victory. A long-term goal is the ultimate goal you want to achieve. It could simply be the issue you identified. Always celebrate your accomplishments.

Intermediate goals are smaller goals that need to be accomplished to achieve the long-term goal.

An intermediate goal could be to have a speaker address relevant Canon Law issues that are of concern to your group.

Short-term goals are the steps toward achieving your intermediate goals. A short-term goal could be getting an agenda of the next bishop's meeting.

**Resources:** These are the assets your own affiliate or group possesses (ie. Time, money, energy, gifts of members, access to people/locations/press/communications devices etc.). Be as thorough as possible when listing the group's resources.

**Groups:** Groups of people are the people affected by the problem. There are three types: constituents (ex.: parishioners), allies (fallen away Catholics or survivors) and opponents (Opus Dei groups).

Constituents are the people you can bring into your campaign because they care about the issue and will be directly and positively affected if you win your campaign.

Allies are the people who will support you but may not necessarily join your group.

Opponents are the people who will actively organize to prevent you from winning your issue. Individuals hostile to you and your group can affect the environment within which your campaign is run. They are not your opponents unless they can actually organize to stop your efforts. Try to figure out how your opponents are organized and how they could oppose you.

**Target:** The target of your campaign is the person with the power to give you what you want.

Primary target is the specific individual who has this power.

Secondary target refers to someone who can apply pressure on your primary target (sometimes your constituents are the people you are targeting, other times it is a well-respected priest, etc.)

**Tactics:** Tactics are the specific things that your constituents and allies can do using the resources you have to put pressure on your target to give you what you want (your goals). You may also want to include research & media as important elements in implementing your tactics.

**Opportunities and Constraints:** interceding events from the outside world. Good strategies adapt to capitalize on opportunities and work around constraints

## A Strategic Plan of Action and Key Steps/Critical Behaviors (15 min)

### Strategic Plan of Action

1. Do research to identify the problem and the best way to address it.
2. Use information from this research and turn this problem into an issue. An **issue** communicates what you need to solve your problem. The issue is the goal of your campaign.
3. Develop a strategy using the strategy chart as a tool to think all details through.
4. Make a "to do list" with everything that you want to accomplish. Write down who will do what by when.
5. Mobilize your affiliate and any allies for the cause.
6. Put pressure on the target to respond.
7. Evaluate where your campaign did and did not succeed. Create a new plan to accomplish what you were not able to in your original campaign. Make sure to celebrate your victories and accomplishments, however small.

### Key Steps and Critical Behaviors

Be creative

Be flexible

Introduce an element of surprise

Put pressure on the target to respond

Continuous improvement/making adaptations/improvements to the plan

relentless pursuit of the goal

outthink, outplan and outmaneuver the target

## Evaluation, Closing Prayer (5 min)

### Evaluation

What are some aspects of today's training that:

You liked

You thought went well

You would like to see repeated when this training is offered in the future

What are some aspects of today's training that:

Can be improved (how?)

Should be changed when this training is offered in the future

### Prayer

It helps, now and then, to step back and take a long view.

The kingdom is not only beyond our efforts,  
it is even beyond our vision.

We accomplish in our lifetime only a tiny fraction of the magnificent enterprise that is God's work. Nothing we do is complete, which is a way of saying that the kingdom always lies beyond us.

No statement says all that could be said.

No prayer fully expresses our faith.

No confession brings perfection.

No pastoral visit brings wholeness.

No program accomplishes the church's mission.

No set of goals and objectives includes everything.

This is what we are about.

We plant the seeds that one day will grow.

We water seeds already planted,

knowing that they hold future promise.

We lay foundations that will need further development.

We provide yeast that produces far beyond our capabilities.

**Prayer Ctd.**

We cannot do everything, and there is a sense of liberation in realizing that. This enables us to do something, and to do it very well. It may be incomplete, but it is a beginning, a step along the way, an opportunity for the Lord's grace to enter and do the rest.

We may never see the end results, but that is the difference between the master builder and the worker. We are workers, not master builders; ministers, not messiahs. We are prophets of a future not our own.

Amen.

*-Archbishop Oscar Romero*

# STRATEGY HANDOUT

*Effective actions require thinking strategically about how to solve problems, win concrete improvements in people's lives, and alter relations of power. This resource sheet is designed to help you choose issues and think through the process of developing a strategy to make change happen.*

## **How can an affiliate organize to create change?: Key Steps**

1. Do research to identify the problem and the best way to address it.
2. Use information from this research and turn this problem into an issue. An **issue** communicates what you need to solve your problem. The issue is the goal of your campaign.
3. Develop a strategy using the strategy chart as a tool to think all details through.
4. Make a "to do list" with everything that you want to accomplish. Write down who will do what by when.
5. Mobilize your affiliate and any allies for the cause.
6. Put pressure on the target to respond.
7. Evaluate where your campaign did and did not succeed. Create a new plan to accomplish what you were not able to in your original campaign. Make sure to celebrate your victories and accomplishments, however small.

## **What is a Strategy Chart?: Definitions**

It is a handout that can be used as a guide to help develop a strategy that best suits the situation and the group involved in planning the action. Information is the key to developing a solid strategy.

**Goal:** Goals are measurements of success or victory. A long-term goal is the ultimate goal you want to achieve. It could simply be the issue you identified. Always celebrate your accomplishments.

**Intermediate goals** are smaller goals that need to be accomplished to achieve the long-term goal. An intermediate goal could be to have a speaker address relevant Canon Law issues that are of concern to your group.

**Short-term goals** are the steps toward achieving your intermediate goals. A short-term goal could be getting an agenda of the next bishop's meeting.

**Resources:** These are the strengths and weaknesses within your own affiliate or group. Be as thorough as possible when listing the group's resources. Example: A strength could be the number of people you have in your affiliate or access to a computer. Weaknesses might be a lack of money or internal friction in your group.

**Groups:** Groups of people are the people affected by the problem. There are three types: *constituents* (ex.: parishioners), *allies* (fallen away Catholics or survivors) and *opponents* (Opus Dei groups).

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**Target:** The target of your campaign is the person with the power to give you what you want.

**Primary target** is the specific individual who has this power.

**Secondary target** refers to the person or persons who is affected by the problem.

**Tactics:** Tactics are the specific things that your constituents and allies can do using the resources you have to put pressure on your target to give you what you want (your goals). You may also want to include research & media as important elements in implementing your tactics.

# STRATEGY VISUAL AIDS

