

# Planning for success



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In my previous article, I wrote about how many NALC branches spend the majority of their time and resources reacting to actions and events from outside of the union that threaten the membership. Whether they are new postal policies or programs, or legislative and economic issues, we always seem to be in reaction mode, running here and there putting out fires, always on defense, rarely on offense. But successful branches have found that it doesn't have to be that way. With a look ahead and some strategic planning for the future, a branch can take steps to make the local union stronger, more effective, and allow it to better serve the membership. But it doesn't just happen on its own; branch leaders need to make

it happen. They can do this with some strategic planning.

There are three basic steps to strategic planning:

1. **Determine where you are now.** There are a number of ways to do this. One way is to make a list of what called the SWOT factors for your branch; i.e., the Strengths, Weaknesses, Opportunities and Threats present in your branch. It's good to do an honest audit of the positive and negative factors related to your branch. What are our strengths? Where are our weaknesses? What opportunities do we have? What threats do we face? Another method to assess where you are now is to take a look back and ask the questions: How is the branch different than it was five years ago? What positive changes have occurred? How were they achieved? What negative changes have occurred? What caused them? What developments contributed to these changes? What other opportunities, if any, did you take advantage of?
2. **Decide where you want to be.** Once you have made an honest and thorough assessment of your branch, especially the weaknesses and threats, the areas you need to work on should be fairly obvious. If one of your weaknesses is that you have low turnout at branch meetings, then you should focus on that. If your branch has not been very successful with grievances, then that is an area that needs improvement. After you have decided the areas that you want to work on, you will need to set some goals. One might be to increase the meeting attendance by 50 percent by the end of the year. Or it might be to increase the percentage of grievances being resolved in the union's favor from 20 percent to 75 percent within the next six months. These goals meet the SMART criteria, as they are Specific, Measureable, Achievable, Relevant, and have a Timeframe for completion. (See last month's article for more in SMART goals.)

3. **Establish a plan to get there.** Now that you've determined where you want to go, you need to decide how you are going to get there. For each of your goals, you will have to set some objectives you will need to reach, devise some strategies for achieving those objectives, and create an action plan for doing so. Objectives are specific statements of what steps you will take to reach your goal. Strategies tell you "how" you will do it. To increase meeting attendance, you might decide to better communicate with the members about the importance of coming to meetings and to create positive incentives for them to do so. Your strategies to accomplish this might include conducting a one-on-one campaign canvassing the membership to determine why they don't come and holding door prize raffles, providing rides to the meetings, childcare for those with young children and having free food or snacks at the meetings.

Now that you know what you want to do and how you want to do it, the next step is to create an action plan chart to help make sure it gets done. This chart helps you to assign specific tasks that will need to be done to implement your strategies to meet your objectives and achieve your goals. It's basically a chart with four columns: Task, Person Responsible, Completion Date, Resources Needed. You then break down the individual tasks, assign a person to complete it, assign a date by which it is to be accomplished, and list the resources and materials that will be needed to accomplish the task. Some examples of the action plan chart can be viewed on the NALC website. Go to Member Benefits and click on Education.

Before implementing your plan, you should think about how you will monitor its progress, because even the best-laid plans can go awry. You will need to make periodic assessments to determine answers to such questions as: Are we on schedule? Are our plans still feasible? Did we leave anything out? Have things come up that we did not anticipate? How did we handle them? Does new information suggest changes in strategy? How often you check will depend on the particular plan; just be sure to check on it often enough so that any adjustments that need to be made are done in a timely fashion. You don't want to find out the day before the branch picnic that the person responsible for getting the site forgot to do it.

The final step in planning is the follow-up. Make sure that you celebrate your successes, make corrections where necessary and keep moving forward toward your goals. If you accomplished your objectives, celebrate and let everyone know, especially those who worked on them. It was a lot of hard work, and they deserve recognition. If you achieved part of your objective, celebrate and adjust or develop a continuation of your plan. If you did not accomplish the objective, be sure to recognize the effort everyone made and develop new strategies, or decide if the objective is feasible. If you did not carry through with the plan, then get together and decide if the plan is something that the branch still wants to do; if not, move on to another objective.