

Why Your Local Group Needs a Strategic Plan

By Franck Mounier, MD,
with Laurie Endicott Thomas

I became Northern New Jersey Mensa's Local Secretary (or LocSec, basically the chapter's president) during the depths of Covid-19. At that time, the chapter was dormant, had few engaged members, and had very little money. My first step was to recruit an Executive Committee (or ExComm). Then we all agreed to develop a strategic plan to ensure our meager resources were used effectively. As the old saying goes, "If you fail to plan, you plan to fail." Fortunately, I have led, contributed to, or vetted hundreds of strategic plans in my business career!

Whether I was leading a strategic plan that yielded revenue of more than \$1 billion or one for my Local Group, the concept and principles of strategic planning are the same, regardless of the organization's scale and purpose. The main difference is that most business people already know the jargon and process of strategic planning and are paid to spend a lot of time preparing them. In contrast, most volunteers at a nonprofit are not familiar with SWOT analysis, marketing insights, or positioning and don't have much time to dedicate to it. To add to the challenge, nobody immediately sees the value of something they have never heard of.

Paint the Ideal Picture

My first step was to demonstrate the value of such a plan and then adapt it to the level of the participants. A plan must be co-created, and then everyone must believe in it and be comfortable with the structure of the plan. In September 2020, we couldn't meet in person because of the pandemic, so I used the teleconferencing whiteboard feature to ask people to "paint the ideal picture." I asked them to picture themselves on Dec. 31, 2021, looking back on the year's accomplishments.

A strategic plan is a document that helps members of a group direct all energies toward a common direction and allocate smartly and effectively its limited resources to achieve their goals.



Which accomplishments would give them a sense of pride? Participants suggested about 15 items. We then gave each participant 10 virtual tokens. They had to allocate the tokens to the accomplishments that looked the most important to them. We sorted the most popular items into four categories, which became our strategic pillars.

In total, the work to complete the plan lasted about three hours in meetings, plus editing. Our ExComm held virtual meetings monthly for one hour. In August, we decided to extend each of the following three ExComm meetings by one hour to work exclusively on the strategic plan. So, it was a light exercise but very powerful.

It was a simple plan, but it was everyone's plan, and we were all proud of our little baby. Our plan gave us a set of agreed-upon objectives. It enabled us to enjoy teamwork and experience

synergy. It also made it possible for us to measure our achievements. In 2022, this plan led our rookie team to win our Local Group's first Diamond Jewel Award, the award American Mensa presents to the best-performing chapter in its size category. Did we execute our plan flawlessly? Of course not. But we had a plan: a simple, achievable plan everyone believed in. Of all the plans I've ever worked on, this was the smallest and most primitive. But it turned out to be very satisfying. We have since improved the quality of our plan, developed a decent analytic level (analysis is critical to the success of a plan), and even run a Leadership Development Workshop (LDW) where participants worked collaboratively to build the first draft of our plan.

Structuring Your Strategic Plan

The structure looks like a Greek temple (Figure 1), but it is built from the top down. The top, i.e., the pediment of the temple, is the organization's mission, which is already set by American Mensa's Constitution: to identify, understand, and support intelligence; encourage research into intelligence; and create and seek both social and intellectual experiences for its members.

The vision is where our chapter wants to be in 10 years. The mission and vision are supported by the over-

arching goals, the cornice of the temple. The overarching goals should be set by the ExComm and are then supported by strategic pillars. Each strategic pillar is supported by a set of related objectives, each with its own action plan. These action plans should be reviewed periodically and adjusted as needed. The overall strategic plan should be challenged and modified each year. If last year's plan was successful, you will be starting from a different baseline, so your strategic pillars might change.

In our Local Group, we dedicate one hour per month for the last three months of the year to reconsider our plan. In response to our growth, we adjusted our strategic pillars two times after their first inception.

Will It Work for Your Chapter?

Every chapter is different, and so is every situation. Thus, the planning process should begin with analysis. Consider a simple objective: Have healthy finances. A Local Group must analyze where its money is coming from and where it is going. If your biggest expense is printing and mailing your newsletter, you might explore whether there is a cheaper way. After analysis, someone could propose options that might lead to a plan. The initial plan can then be refined through a process of consensus building.

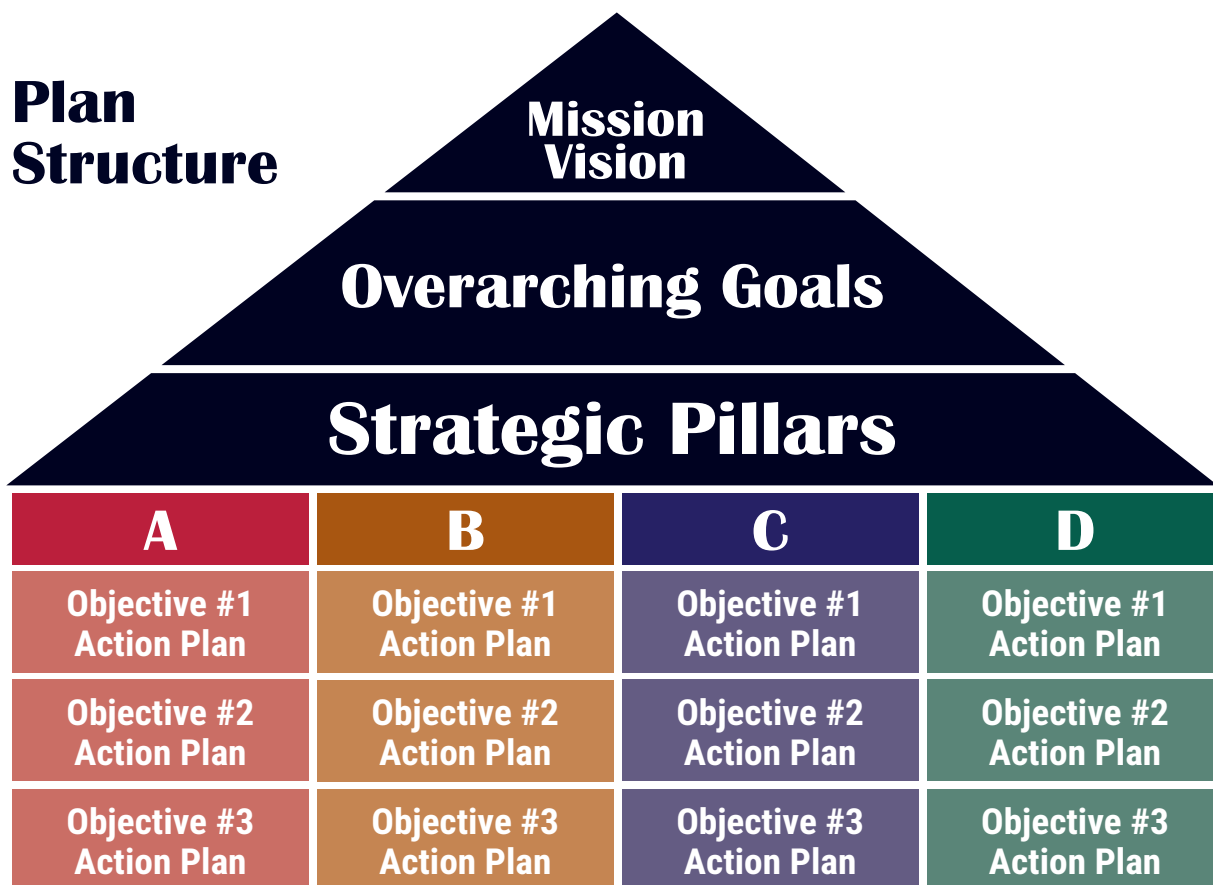
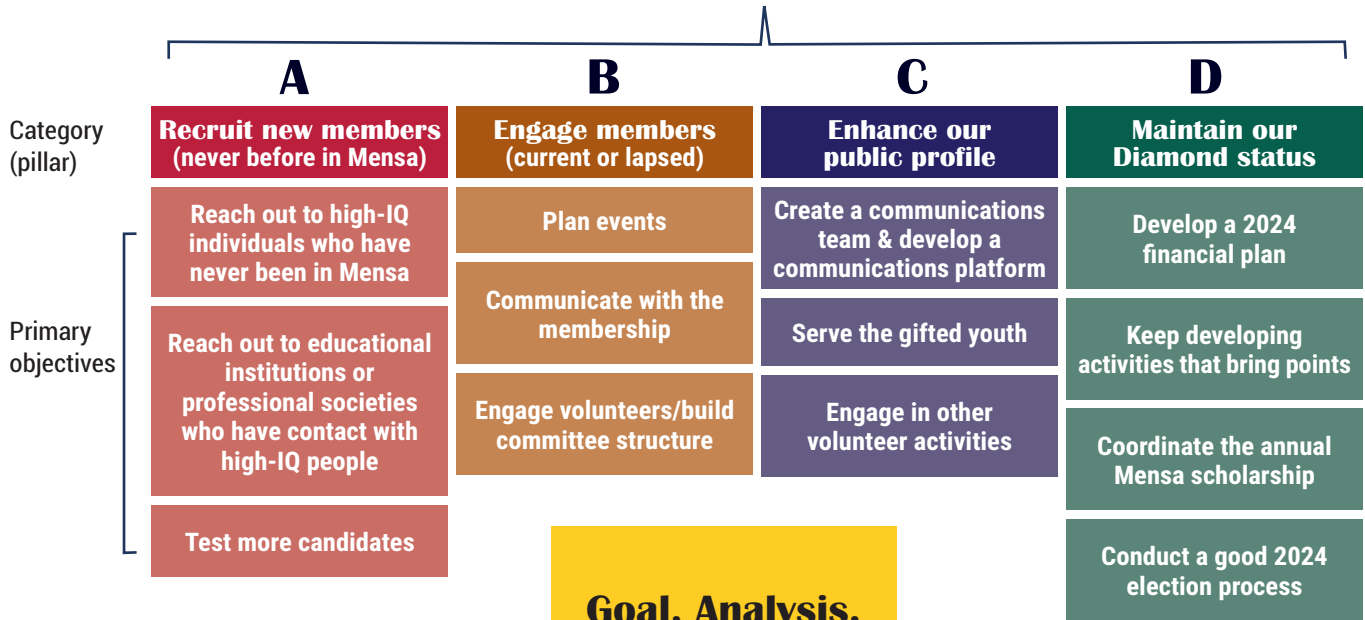


Figure 1. A strategic plan looks like a Greek temple, but it is built from the top down.

Northern New Jersey Mensa: 2024 Plan

Overarching Goals

- Enhanced value for members
- Increasing membership
- Healthy finances



Goal, Analysis, Strategy, Plan

John is in New York and wants to go to Los Angeles. His objective: Arrive in Los Angeles. But what is his strategy? You might think: Just catch a plane. But you would be skipping the analysis: Can John afford plane fare? Does he need to bring his car? How much time does he have? Is John eager for adventure, with plenty of time and wishing to meet people along the way? Is he on a budget? Or is he busy on a work trip?

All of these factors would affect the choice of strategy. So, you start with a goal, do some analysis, pick a strategy that will lead to a set of actions, and then you have a plan.

Ideally, you could recruit a member with business experience to lead this process, or you can attend an LDW.

Simple plans are easy to evaluate. A strategic plan should have three to five strategic pillars, each with three or four objectives, max. Each objective should have an action plan that includes a way to measure outcomes. Check out ours at NNJMensa.org/2024plan.

The plan is a dynamic piece that must be monitored and adjusted. Your ExComm should look at the achievements every three or four months, and this should be done softly: We are all volunteers, so it is OK not to fulfill everything perfectly. It is unbelievable how a simple plan with a decent execution can lead to amazing results. This is the beauty of aligning everyone's energies in the same direction. The plan cannot fail as long as the team has the honesty and will to adapt.

Incidentally, you can sometimes address two challenges at once by pairing them, just as you can turn two negative numbers into a positive number by multiplying them together. For example, if you need to give Young Mensans something interesting to do and your website needs rebuild-

ing, this is the kind of project that could engage a Young Mensan who might not otherwise be interested.

To create and execute a successful strategic plan, you need patience and a positive mindset. You also must value consensus and respect collective intelligence (especially that of Mensans!). And like a good golfer, you must "play the ball where it lies." This means addressing your Local Group's current situation, challenges, and opportunities. The best situation to start a plan is when you encounter challenges; There is no risk to engage in, and it can become a game-changer. And this is sooo satisfying! 🏆

Attend Franck's Leadership Development Workshop on strategic plans at the Kansas City Annual Gathering, scheduled for Wednesday, July 3, at 4:30 p.m. Confirm timing on the AG app or at ag.us.mensa.org.

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