

**FROM SUMMER TO STRATEGY –
VISIONING & STRATEGIC PLANNING
FOR CAMP ASSISTANT DIRECTORS**

AGENDA

- Welcome, Introductions and Connection
- Context – Why and Why Now
- Learning Objectives and Outcomes
- Mission, Vision, Strategy Primer
- Strategic Planning Overview and Process
- Discovery
- Creating a Vision
- Creating the Strategy
- Workshopping
- Wrap Up

LEARNING OBJECTIVES AND OUTCOMES

- Identify the difference and connections between mission, vision, strategic planning
- Learn how to Identify and analyze current macro forces that affect your vision, the relevant lifecycle to consider, future desired state growth and success, and strengths, weaknesses, opportunities, and threats through a SWOT framework
- Craft a clear, inspiring future-state vision that can be applied to a camp overall or their area of responsibility
- Translate the vision into high-level strategy including key strategic priorities and actionable goals, along with owners, timelines, work plans, key performance indicators and budget impacts

INTRODUCTIONS



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CONNECTION

- Name
- Camp and Role
- Years of Jewish Camp experience
- One non-negotiable that needs to be in the vision of Jewish Camping for the next 3 years

**“IF YOU WANT TO GO FAST, GO ALONE. IF
YOU WANT TO GO FAR, GO TOGETHER.”
- AFRICAN PROVERB**

WHERE THE WORLD IS.....



THE APPROACH



VISIONING AND STRATEGIC PLANNING PRIMER

- Mission – The Why
- Vision - The What, When and Where
 - Aspirational and realistic, provocative and not threatening view of the future written in the present tense
 - Platform that allows for powerful strategy creation and implementation
 - Written and shared
- Strategic Plan – The How
 - Overall narrative, arc of the plan and what growth/success looks like
 - Key strategic pillars
 - Goals
 - Initiatives
 - Owners
 - Timelines
 - Key performance Indicators

THE STRATEGIC PLANNING PROCESS - VISIONING

Preparation/Discovery

- Select Topic
- Select Author and champions/committee
- Setting the table - Discovery
- Review the Discovery

Visioning

- Reviewing/Revising
- Sharing/Revising
- Finalization and transition into strategy

Strategic Planning

- Finalize narrative, priorities and goals
- Identify owners and create priorities, work plans, timelines, KPIS, budget impact
- Share, revise and finalize

THE STRATEGIC PLANNING PROCESS – DISCOVERY

Review existing data and information – past strategic plans, budgets, survey scores, plans, demographics, competitive analysis etc

Stakeholder interviews – campers, parents, board, alumni, donors, key partners

Stakeholder survey

Discovery meetings with staff and board specifically

Assessment completion and sharing with relevant parties

PREPARATION - SETTING THE TABLE

- Start with a foundation of trust (yourself and others) – **vision + strategy run at the speed of trust**
- Need to understand the macro context that informs the vision and the internal factors that are used as vision goggles
- Create a base of optimism upon which you can build a vision

SETTING THE TABLE CHECKLIST

- Vulnerability, Courage, Trust, Curiosity, Candor
- Macro factor Examination
- Lifecycle analysis
- What does growth and success look like
- SWOT
- Review Past Strategic
- Recent achievements

SETTING THE TABLE – MACRO FACTORS

- Affordability
- Changing Demographics
- Disaffiliation from Judaism
- Non camp competition - niche programs, year round school,
- Anti-Semitism and Anti-Israel
- Staffing issues
- Consumer trends and behavior
- Need for community and connection
- Supply Chain
- Safety and Security
- Mental Health and Wellness – youth, teens and adults
- Economy and inflation
- Technology and Social Media
- Diversity, Equity and Inclusion
- Other

SETTING THE TABLE - ORGANIZATIONAL LIFECYCLE ANALYSIS



SETTING THE TABLE – GROWTH AND SUCCESS NARRATIVE

What does growth and success look like in the future?

SETTING THE TABLE CHECKLIST - SWOT



WRITING YOUR VISION

- Pick your topic
- Send yourself into the future – Pick a date, time and place
- Write from the heart + access your passion
- Review the set table – macro forces, lifecycle, growth arc and SWOT
- Focused flow technique
- Write the First Draft of the Vision – long form story with many key sections
- Sharing/ownership transfer/alignment
- Review and Finalize
- Transition to strategic planning

VISION SHARING - OWNERSHIP TRANSFER AND ALIGNMENT

Assemble and prepare team of the right champions

Send the 4 Questions

- What do you like
- What needs more clarification/information
- What is missing
- What are you challenged by or disagree with

Create a summary deck of question responses – look for patterns and relevant outliers

Review, discuss and revise

Share with key stakeholders

It's the Fall of 2028 and we have just completed our centennial summer of Jewish overnight camping. The past three summers have been among the most exciting in our 100-year history and have made us one of the biggest success stories in Jewish Camping. We have evolved from being a great camp to an excellent camp and are considered one of the best in our field. We have amazing people – including amazing year-round and summer staff, as well as an educated, engaged and activated board. Our camp is at a newly defined operational capacity of 350, our retention is above 90% and our CSI/SSI scores are among the highest in the nation. Our culture is strong, we live our core values daily, and we strive to make camp affordable for all campers. Our alumni have never been more engaged and we have moved from financial stability to financial sustainability with our evolved economic model. Our Master Site Plan serves as the physical expression of our mission, vision and values and with our new capital campaign, we are already building phase I. We have truly met the moment for our community and are laying the foundation for the next 100 years.

STRATEGIC PLANNING TRANSITION

Create the strategic plan transition document

- Boil down the long form into 1 page vision
- Identify the big key buckets/priorities (section headings)
- Use the rich details of the vision to identify goals

Share with key stakeholders for directional correctness

Identify priority/goal owners and create work plan initiatives, timelines, metrics and budget impact

Share with stakeholders for guidance and revision

STRATEGIC VISIONING

WORKSHOPPING

PREPARATION

- Pick your topic
- Set the table
 - Macro Factors
 - Lifecycle
 - What does growth and success look like?
 - SWOT
- Assess last version
- Abundance around the topic

WRITING YOUR VISION

- Send yourself into the future – Pick a date, time and place
- Write from the heart + access your passion
- Review the set table
- Focused Flow technique
- Use bold headings and sections to start
- Write the First Draft of the Vision
- Review, Update and Tweak

OWNERSHIP TRANSFER AND ALIGNMENT

- Assemble and prepare team of champions
- Send the 4 Questions
 - What do you like
 - What are you challenged by
 - What needs more information
 - What is missing
- Create a summary deck – patterns and relevant outliers
- Review, discuss, revise and share

STRATEGIC PLAN CREATION

Create strategic plan bridge document

- One page high level vision
- Draft priorities areas
- Draft goals

STRATEGIC PLAN CREATION

Identify priority and goal owners to work deeper to create the roadmap and for each goals, create:

- Initiatives
- Timelines
- Key performance Indicators
- Budget Impact

STRATEGIC PLAN CREATION

- Share draft with the key stakeholders/decisionmakers
- Revise and finalize
- Identify operating conditions for success
- Create implementation plan, tracking, communication/reporting

WRAP UP

- One feeling
- One takeaway

Questions, Comments and Thoughts

Thank you!

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