



Strategic Planning Workshop Report

Report from November 2018 Workshop with National Council and Staff

Overview

At the November 2018 meeting of the Daughters of the King National Council the council members participated in a strategic planning workshop on November 9, 2018. The workshop was conducted by Ane Deister and Jen Mariano at the National office. An opening silent brainstorm activity was conducted where the council members shared their expectations and concerns for the strategic planning implementation process. Collectively the council members shared 75 specific comments that were grouped into six major headings: Concerns, Goals, Planning, How To's, Action and Communication.

Ane and Jen led a PowerPoint presentation that provided basic information regarding the purpose for the strategic planning program overall, the resources available to members to implement the plan and the need to support and grow The Order of the Daughters of the King® by, among other things, updating practices, policies and programs that will simultaneously sustain existing members and attract new members. That PowerPoint presentation is appended to this report as a separate attachment.

The council members engaged in a series of interactive break-out sessions designed around the six strategic goals: #1: Inspire Spiritual Growth and Development; #2: Strengthen Our Call to Service and Evangelism; #3: Nurture and Grow Our Members; #4: Raise Up and Mentor New Leaders; #5: Foster Community and Build Connections; #6: Instill a Spirituality of Giving. There were three breakout sessions for each of the six goals where council members interacted with each other as well as the National Office staff to provide details on ways to implement the goals. They selected the groups to participate that most closely align with their leadership role in the Order - Not sure what you mean to say in this sentence.

A key resource for implementing the strategic plan involves off-council volunteers. These Daughters of the King volunteered their gifts and skills through a Strategic Plan Contribution Card distributed at Triennial and via a Contribution Form on the strategic plan webpage of the National DOK website. A spreadsheet of the volunteers, their areas of expertise, and the goals they would like to work on is provided in a separate attachment.

Summary of Council members' expectations and concerns

The opening silent brainstorm provided an opportunity for council members and staff to express their initial ideas and concerns that relate to implementing the strategic plan. The comments covered the gamut of topics, observations, and perspectives.

Common ground, understanding: Some members expressed concern about making sure that we are in essence 'rowing in the same direction' as we implement the plan. A few examples are provided below:

- Action: Unity in action teams
- Communications: Finding common ground

- Planning: Cohesive body; moving in harmony; Greater collective understanding of the road map
- Action: expect the workshop to firmly ground the national council in our role

Overcoming obstacles, fears: Other concerns related to perceived obstacles/challenges and some fears as provided below:

- Communications: Impacts to current state
- Goals: How to attract younger women to become DOKs; how to move DOK into the 21 century
- How To's: how to open up with the group; create a task list; clarity
- Concerns: hard work; fear that many chapters/leaders will ignore; getting away from out identify of being an Order; lack of understanding; finding enough Daughters to help step forward; concern for better understanding of the strategic planning documents; Daughters' chapters will resist change; not being able to remember everything; fear about not enough time to accomplish tasks; fear about individual gifts as to how to best use them; fear that everyone lets it go when they go home
- Planning: want to have a better understanding of my role in the plan; learn how to implement the plan; eliminate the concerns of all; prioritize the work; understanding the parts of the plan more fully

Moving into Implementation: Shifting gears, there were comments related to a desire to move into the action phase – how to implement – as noted below:

- Action: Hope for a 'jump start' on the first phase; actionable items; knowing how to share it
- Goals: Move forward not backward; move towards the goals; obtain success; to gain a vision of how to sell the strategic plan to others; learn specific action steps to implement the plan; how to implement
- How To's: Action plans developed; create a task list; 'zero in' on tasks to move forward; how to move older DOKs out of the 19th century; how to implement;
- Planning: how to garner interest; prioritize the work; to have a vision of how to implement the Master's Fund; learn how to implement at the 'grass roots' level; finding a way for council members and staff to compromise

Breakout sessions feedback on how to implement

Despite the concerns and some fears about implementing the plan, the desire to move forward and take initial steps to implement fueled the breakout conversations around how to implement the plan. This part of the workshop yielded some specific actions, tactics, and planning approaches to implement each of the goals. A summary of those discussions and that work is provided below:

- **Goal #1: Inspire Spiritual Growth and Development:** Three different break out groups discussed ways to implement this strategic goal and suggested ways to measure success of those implementing actions. Their discussions recognized the quintessential relationship between spiritual growth and development and The Order's Rule of Life. Daughters pledge to undertake a life-long program of Prayer, Service, and Evangelism, dedicated to the spread of Christ's Kingdom and the strengthening of the spiritual life of her parish. A summary is provided below:
 - Breakout group #1: Specific actions are provided below along with the metrics for measuring the effectiveness of those actions. Overall council members saw

the value in educational-related activities, highlighting the need for information to be developed, distributed and made available as a way to get things rolling:

- Develop educational materials at the chapter level; and resource materials with guidelines
- Rewrite the discernment study guide; updating existing literature
- Enhance webpage resources
- Provide continuing education in spiritual development for all members
- Metrics to measure success include: monitor product availability – how many people requesting/receiving materials; seek feedback regarding the products – to determine if the document met their needs; provide a directory with contacts to answer questions, seek guidance
- Breakout group #2: This group also saw the need for information and education, highlighting the importance of multiple formats to reach a broad audience of Daughters:
 - Provide resources for spiritual growth including speakers, books, music, movies, PowerPoint presentations, videos, and communications about these resources through Facebook, YouTube, webinars, that can be used in chapter meetings, diocesan and province assemblies to educate and engage Daughters at all levels
 - Metrics include conducting periodic interviews, satisfaction surveys, making sure that the techniques are ‘age appropriate’ regarding comfort with various communication techniques
- Breakout group #3: In this breakout discussion the group focused on the need to reinforce our commitment to God and our call to deepen our spiritual life as we implement this goal. Suggested actions and metrics are provided below.
 - Add to our existing spiritual literature to integrate contemplative resources and then survey chapters, dioceses and provinces in a variety of ways: written hard copies, published for all Daughters to use; survey with evaluation forms to find out if Daughters know about the new resources and whether they found the information useful
 - Create a directory of speakers and spiritual resources – again surveying the various levels of Daughters to see if it was accomplished
 - Explore the possibility of professional nuns including what the nature of the relationships with DOK would look like
- **Goal #2: Strengthen Our Call to Service and Evangelism**
 - Breakout group #1: This group focused on three areas of implementation related to storytelling, leadership development, and praying. A summary of the details and potential metrics are provided below:
 - The members recognized the value and power of sharing individual stories regarding our individual ‘call’, suggesting that this goal could be implemented using short YouTube videos. To enhance success with this approach we need to provide a list of elements of a story and actively seek and encourage participants to follow through to make their own video. Keeping track of the number of YouTube views and monitoring the number of requests for videos would help assess the effectiveness. A broader measure of success might involve distributing questionnaires at Province retreats to discover the degree to which these resources are used, valued and found to be useful
 - A part of the strengthening process involves development of new leaders. This could be achieved by providing leadership small step opportunities –

- such as taking turns at the chapter level to lead meetings and providing opportunities at assemblies/retreats and other venues for younger and new Daughters to serve as a table leader.
- Praying into service to reflect God's love is an essential element in implementing this goal and would involve actions and resources such as
 - Teaching Juniors how to do it; survey or interview to determine if useful
 - Develop a prayer for chapters to use and promote it on *The Royal Cross* and DOK webpage; survey or interview regarding usefulness
 - Create a form for a Daughter to use to name someone she wants to pray for; this activity may be included in an update to the Study Guide by (and?) the Rule of Life, also reflected in the DOK brochure; check to see how many use it
 - Breakout group #2: This group discussed ways to communicate and educate Daughters at all levels on how to share God's love and Good News including:
 - Provide provincial and diocesan assemblies with speakers/workshops; keep count of the number of workshops for each diocese and province
 - Provide support and resources to chapters to encourage Daughters to fully embrace our mission of prayer, service, evangelism; keep count of these efforts
 - Create a manual (or list?) of service project ideas for chapters including a 'how to' implement them; keep track of number of projects conducted
 - Promote Daughters with Bishops, parishes by communications about our strengths, US and abroad; attend conferences/conventions and give presentations about DOK; track number of meetings and presentations
 - Breakout group #3: This group also focused on the need for materials to educate, along with the need to conduct missions, reach out to other denominations, and be visible in community events:
 - Educate Daughters on the importance of giving as part of the strengthening process
 - Share stories using a diversity of electronic venues, including via website
 - Educate on the definitions and implementation of prayer, service, evangelism – best conducted in workshops and through specific documents; track numbers of workshops and documents produced
 - Expanding out to share with other denominations through open houses, VBS, community gatherings; keep track of events and numbers of participants
 - Secure funding for Junior Daughters to attend mission trips; measure funding and trips completed
 - Increase community visibility by participating in events, through annual reports and newsletters; keep track of number of community events (at all levels) and number and types of reports
 - **Goal #3: Nurture and Grow our Members:** This group noted the importance of being open to new ways to attract new members and the need for specific accountability to focus on the suggested implementation steps.
 - Breakout group #1: Recommendation that each province and diocesan assembly have a Membership Chair on their respective boards to coordinate and champion this goal

- Membership Chair to delegate ‘ambassadors’ to visit chapters, diocesan meetings and assemblies to support membership functions
 - Provide specific information for chapters to know who to ask for support in growing membership; survey membership to discern if the information was useful
 - Involve NEP to support chapter, diocesan actions
 - Annually monitor number of new chapters, members at senior and junior levels
 - Encourage chapters, dioceses and provinces to collaborate on service projects, retreats, assemblies
- Breakout group #2: Again, the emphasis is on a designated Membership Chair plus a designated point person for strategic plan implementation at the chapter, diocesan and province levels; key responsibilities involve developing some specific ‘hands on’ materials to support chapter growth; metrics to measure growth as indicated of success
 - Designate a Membership Chair at province, diocesan assembly and chapter levels
 - Designate a strategic planning coordinator at the province, diocesan assembly and chapter levels
 - Develop best practices document for different target populations – illustrating some flexibility – for example day meetings or night meetings
 - Use the Internet more at all levels for communication, organization, scheduling and sharing; provide technology training
 - Develop a ‘how to start a chapter’ video
 - Encourage DALs to start chapters too
 - Unable online only chapters
- Breakout group #3: Measures discussed by this group addressed a strong transition process from Junior to senior, providing tool kits, and reaching out to colleges and universities as new sources of members:
 - Provide a strong transition program from Junior to senior Daughters; measure numbers to see if senior members go up
 - Create a Vitality Tool Kit for Chapters; add this to DOK website with updates every 5, 10, 15 years – metrics include measuring numbers of chapters and members at each interval; create an evaluation tool for chapters to use to assess of transition process improvements
 - Develop college DOK chapters by reaching out to college chaplains and through DOK literature and providing access to *Cross+Links*; create an evaluation tool
 - Provide scholarships for college members to attend diocesan and provincial assemblies and Triennial; track number of college chapters and members in the chapters that attend these events
 - Create a chapter history book that features service projects and provides an opportunity for members to share their stories; create a satisfaction survey to assess whether this book is well received by the chapter
- **Goal #4: Raise up and Mentor New Leaders:** The three breakout groups working on this goal suggested having the province leaders serve as models to be replicated at the diocesan assembly and chapter levels; focused on discovering ways to know and use your gifts; and addressed ways to provide coaching and mentoring to support leadership development. Summary is provided below:

- Breakout group #1: This group recognized that the province board leadership provides a model and should be encouraged to develop ways to replicate leadership practices at the diocesan assembly and chapter levels
 - Province boards could be the ‘instigator’ to instill leadership practices at other levels
 - Identify candidates at the other levels and make mentors available to educate/assist them to take on more leadership roles
 - Plan meaningful retreats that convey the tools necessary to achieve this goal
 - Recognize leadership and celebrate it so others will be aware of the leadership resources
 - May need chapter, diocesan reports to province boards to track progress and success
 - Use surveys to determine if workshops and other tools provided at assemblies were useful
- Breakout group #2: This group focused more on getting to know your gifts, helping others to discover their gifts, and helping them see how they can be leaders
 - Conduct spiritual gift assessments: at assemblies, with articles in *The Royal Cross* and *Cross+Links*, on the National DOK website, include in *The Chapter Manual*; metrics include surveying the number of visits to website, etc; get reports from chapters and dioceses about the outcomes from assemblies
 - Share info about NEP resources in a variety of venues but at least at workshops at assemblies; metrics involves numbers of meetings, webinars provided by NEP representatives
 - Update literature to expand knowledge on technology applications, use of webinars and electronic forms of information sharing and for committee meetings; metrics involve a survey of before and after technology training
 - Invite NEP chair to assemblies and workshops to focus on importance of supporting new leaders; track number of presentations and conduct survey to evaluate each visit
 - Develop materials and a list of mentors for Juniors transitioning to senior Daughters; track number of chapters using this material
- Breakout group #3: Mentoring, succession planning, outreach to Juniors and encouragement featured in this group’s discussion.
 - Create 1:1 mentor programs in chapters
 - Model succession planning at all levels
 - Encourage committee chairs to identify people’s gifts
 - Increase Junior participation throughout the organization at diocesan and province retreats/assemblies and representation on The National Council
 - Encourage older Junior Daughters to mentor younger ones
- **Goal #5: Foster Community and Build Connections:** The three groups that discussed this goal focused on communications, maximizing the use of existing literature, creating new ones as needed, encouraging storytelling, increasing the use of electronic communications and social media, making funds available for scholarships to attend diocesan, province assemblies and Triennial, and actively reaching out to Daughters who are not attending meetings.

- Breakout group #1: This group highlighted communications as a key way to foster community and build connections; use of multiple communications approaches noted would facilitate and invite engagement of members at every level and age group.
 - Work together to reinforce message of the Strategic Plan
 - Provide articles in the international e-newsletter *Cross+Currents*
 - Post more articles about this goal on DAL webpage
 - Use YouTube and live streaming more to enhance visibility
 - Allocate funds to develop story sharing, mission trips Internationally
 - Apply web and social media analytics
 - Metrics involve tracking electronic media visits, comparing annual reports from the past and satisfaction surveys
- Breakout group #2: Another focus on the role of effective communications is to build community and connections; they also noted how strategic funding will enhance implementation of this goal.
 - Expand communications – video tutorials on website, etc.
 - Translate literature for non-English speaking audiences
 - Conduct outreach to other geographies and cultures by worshiping at different churches
 - Each chapter should be visited by a board member from either diocesan or province level
 - Funding scholarships to encourage Daughters to attend the various events
 - Promote open, transparent communications such that all levels are on the same page and know what is happening throughout the organization
 - Metrics would involve counting number of literature translations, the number of Daughters receiving scholarships to attend events, and tracking how many chapters had visitors from other organizational levels
- Breakout group #3: This group focused on outreach and community-building exercises and the AHOY program.
 - Once a quarter host a special event (not typical meeting) such as a tea, devotion, or service to draw in members who may not be attending meetings
 - Sponsor regional (multiple chapters) gatherings on All Saints Day
 - Create Anonymously Honoring Our Youth (AHOY) program with anonymous prayer and cards sent throughout the years through high school graduation; once the youth graduates share who was doing it
 - Feature community building activities at retreats and assemblies at diocesan and province levels
- **Goal #6: Instill a Spirituality of Giving:** These three groups discussed the need for transparency and communications around how funds are spent, share how specific funds are designated to be disbursed for specific uses – Masters, SD, Alpha, promote the uses of these funds to encourage more contributions, and share the experiences of people that received grants and funding.
 - Breakout group #1: Transparent communications include:
 - Preparing videos of how funds are spent; post on website for maximum access
 - Communicate to parishes that there are funds available
 - Promote Planned Giving

- Metrics relate to tracking number of times videos used, pre- and post surveys, tracking the number of calls where Daughters want to know what their dues pay for
- Breakout group #2: This group also pointed out the need to make sure it is clear how dues are used and how money is spent. They included seeking grants to augment resources; and suggested it is better to set 'needs' goals and not annual goals.
 - Reveal results of money given to DOK
 - Set "needs" goals not annual goals
 - Reveal needs of smaller chapters/dioceses and conduct an appeal to other organizations (extended geographies) to contribute to help meet needs
 - Seek grants from different levels to special programs and equipment
- Breakout group #3: Publicizing funds available, augmenting with outside grant funds, telling grant success stories, and create an Outreach Chair at each level – province, diocesan assembly, and chapter are ideas from this group.
 - Create brochure that promotes the funds of DOK with self-addressed envelop for recipient to contribute
 - Provide communications on how to access the funds
 - Suggest having an Outreach Chair at each level
 - Set measurable goals of increased giving to the funds at all levels
 - Procure a grant writer for DOK to assist in getting appropriate outside funds
 - NEP develop guidelines on giving and receiving
 - Measure all fund balances comparing how much received before implementing these ideas versus after implementing them

Next Steps – Task Checklist

Based on the implementation suggestions provided in the trio of breakout groups around each of the six goals, a draft checklist is attached that will help begin the implementation process. These are steps directly tied to the suggestions from the breakout groups. It highlights the areas where the Council can prepare some guidelines and leadership, seek off-council help, as well as how to move implementation through the organization, with ultimate responsibility at the chapter level.

This is only a starting point for the Council to review, modify, edit as appropriate and then province presidents can use/share it with their DAPs. It also includes some suggestions of how The National Council committee chairs may be directly involved in setting guidelines, providing leadership and identifying resources, for example seeking help from the National Office staff and off-council volunteers, to set these actions in motion.

This checklist was developed not to be the 'final' but to provide a starting point to facilitate dialog, and engage the National Council members, as well as the National Office staff, that will ultimately result in a document in which everyone agrees provides clear steps forward.