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## COUNCIL SELF-EVALUATION

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### How well are you and your council doing as provincial leaders?

Many councils attempt to answer this question by assessing member opinion. If there are few complaints from 4-H members and staff, council members believe they are doing all right. Council representatives may believe they are doing a good job because the feedback from regional councils is positive, or possibly there is no feedback and one assumes that “no news is good news”. Some appointed council members view reappointment as an affirmation that they are doing a good job.

Local 4-H members and leaders can provide informal evaluation data about the provincial council, but they cannot provide the kind of evaluation the council really needs. It’s a rare community member who clearly understands the roles and responsibilities of a provincial body like the Alberta 4-H Council, and effectively measures the council’s performance.

Council members need to engage in regular self-evaluation to ensure that they continue to exercise the most effective leadership possible.

### Ingredients of Effective Evaluation

There is no one way or method to examine and evaluate the council. How the council views its role will effect the way the council evaluates itself. When the council views itself as being an important component of a partnership dedicated to the long-range success of the 4-H program, more effort must be exerted to measure the council’s effectiveness.

The following are some standards that are essential evaluation elements and outcomes. For example, an evaluation should be constructive. It should be a tool that is both helpful and positive, assessing both strengths and areas for improvement. It should provide a systematic process by which the members of a council can improve their performance.

Council members should develop the standards against which they will evaluate themselves.

They should be involved in developing the standards that measure their relationship with their regional council, other council members, staff, leaders, parents and so on. Also, they need to measure how well they conduct meetings, discussion groups at regional council meetings, and how effectively they plan, make decisions, communicate and support the decisions of the council. Council members need to evaluate their roles, responsibilities and personal effectiveness in relation to the council and other committees they serve on. In general, evaluation at year-end should focus on what the council planned to do compared to what it achieved.

Evaluation should be based on goals the council sets for itself, not on the goals it helps set for the entire 4-H program. When developing an evaluation instrument, the council should recognize the difference between council goals and provincial organizational goals.

The evaluation process should include council setting its goals and strategies for improving council performance. Some groups include in their evaluation instruments a place where evaluators can write suggestions for improvement. These suggestions are used to set objectives and establish group priorities.

The council should not limit itself to considering only those items that appear on the evaluation form. Truly, an evaluation form initiates the process of generating needed data, but other feedback should be welcomed, as well. Other useful information may be offered in the form of personal comments from council members, staff, other knowledgeable resource people, members, leaders, parents, sponsor representatives, and others.

Formal evaluation should occur at least once a year and at a scheduled time and place. Once a final report is written, the evaluation process is continued by re-establishing the council's goals for improvement and accomplishment.

An overall picture of council's strengths and weaknesses is best. To help generate this picture, each council member should complete an evaluation form independently. The assembled data should then be considered by the council as a whole. It is important to avoid personal criticisms, and focus on council action.

The council should have an orientation on the self-evaluation process. Self-evaluation should not occur until all members of the council understand what is expected of them. When new members come on board, they should be introduced to the evaluation criteria and the goals the council has set for itself. In addition, the council as a whole may undergo training in selected areas needing improvement. For example, if the working relationships of council members are strained, outside resources or training may be necessary.

## Methods of Evaluation

One informal method for evaluating council performance is to assess observations and suggestions from the 4-H community. "How vocal is the community?" "What do 4-H leaders, key leader, parents, regional specialists, provincial staff, sponsors and others say about the role the council members play in the decision-making process, in sharing of information and providing overall leadership in the organization?" "What are their concerns and are council members representing them effectively?" The answers to such questions can provide crucial information for a critical look at how well the council functions.

Another informal evaluation method is to examine the minutes of council meetings. Look at how much time the council devotes to that which it deems most important. Although such an assessment might form the sole basis of self-evaluation, it is best to include it as part of a larger process.

Most popular among self-evaluation techniques is the use of a questionnaire. This tool makes evaluation more manageable by listing the criteria against which the council will appraise its own performance. Questionnaires can be lengthy and all-inclusive, categorizing evaluative questions or statements under broad headings such as council operations, instructional programs, relationships

with others, fiscal management and so on. Other questionnaires can be designed to measure council effectiveness in just one area, such as council meeting procedures.

In addition, a questionnaire can be designed to measure both council “process” and council “product”. Process evaluation deals with how the council operates. Product evaluation deals with the results a council obtains as an output of setting goals.

There are a number of sample questionnaires available that the council could adapt. Most groups tend to extract various elements from several instruments to construct one that best meets their needs.

Here are two examples.

**Meetings are run in a timely and effective manner.**

\_\_\_\_\_ Adequate \_\_\_\_\_ Inadequate

How to improve \_\_\_\_\_

**Encourages the involvement of potential leaders, members and supporters beyond the club level**

\_\_\_\_\_ Adequate \_\_\_\_\_ Inadequate

How to improve \_\_\_\_\_

Another instrument that evaluates the process or operational performance of the council covers such areas as council meetings, relationship with staff, council and community relations, and personal qualities of council members. It asks whether the council always, sometimes, or never does such things as:

- ◆ Reviews agendas and background materials well in advance of meeting.
- ◆ Does not present new issues of a complex nature for immediate action.
- ◆ Works and plans with the staff in a spirit of mutual trust.
- ◆ Actively seeks input from the community in establishing goals and objectives.

Another instrument covers the areas of orientation, operational method, meetings of the council, community relations, planning and continued development of council members. Among other things it asks if the council:

- ◆ Conducts an orientation program for new council members to acquaint them with their duties and responsibilities, the by-laws of the council, 4-H policies and operating procedures, and so on.
- ◆ Operates according to written policies.
- ◆ Seeks 4-H staff and 4-H Branch input while developing recommendations for changes in policies, projects, programs, regulations, and so on.
- ◆ Schedules council meetings at times and locations convenient to council members, the staff and community.

In the area of decision-making, council members are asked to evaluate the council in the following areas:

- ◆ Is not dominated by cliques or “power blocks” of council members who attempt to control council deliberations.
- ◆ Works to find grounds for compromise and consensus where there are disagreements.
- ◆ Exhibits effective decision-making skills.
- ◆ Bases decision-making on its representation of the regions and not on small special interest groups, or private conversations with lobbyists.
- ◆ Expects its members to respect decisions of the majority of the council.

Based on what the council would like to measure or evaluate, and the evaluation instruments to be used, the council will need to develop its own methods or procedures of self-evaluation.

## The Keys to Success

The critical factor in council self-evaluation is not the instrument or process the council uses, but the need to identify the specific criteria that spell success for the council. The council must state well in advance what it wants to achieve, otherwise there can be no basis for assessment. Without goals against which to judge where a council has been and how far it has come, there can be no true evaluation. Evaluations take time and commitment. There must be trust between council members, good faith, sensitivity and respect for one another. If your evaluation effort is based on these qualities, and council members focus on improvement (rather than on criticisms and blaming), the council can make self-evaluations one of its most productive and rewarding activities.

## Steps to Self-Evaluation

1. Recognize need for self-evaluation.
2. Decide on evaluation process to use.
3. Select or develop an evaluation instrument.
4. Each council member completes instrument. (If desired, have people external to the council also complete the instrument).
5. Tabulate and report the survey results. (An effective way to show the data is in a chart or graph).
6. Decide how council will improve weak areas.
7. Set new goals.
  - ◆ Decide on the goals of the self-appraisal. A clear statement of the purpose of the evaluation will help avoid confusion and divisiveness.
  - ◆ Decide what aspects of council operations to evaluate. Most of the time, the council will want to evaluate the total range of its activities. On occasion, however, the council may wish to scrutinize a particular aspect of its operations.
  - ◆ Select and adapt an evaluation instrument. It's essential to select an instrument that concentrates on the areas the council has chosen to evaluate, and one that yields the kind of information that can help the council achieve its goals.
  - ◆ Set a schedule and plan for completing the process. The council should decide in advance when council members will complete the evaluation instrument; whether the completed forms will be sent to a central location, and if so, where; whether the completed form will be compiled and by whom; and when the council will discuss the findings.
  - ◆ Hold a meeting of the council to discuss the appraisal findings. This is the most important step in the process. The discussion should be guided by the council's goals. The outcome should be a new set of performance goals for the next evaluation.

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## ALBERTA 4-H COUNCIL BOARD DEVELOPMENT SEMINAR

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held at the Alberta 4-H Center on November 26, 2005, 8:00 a.m. to 12:00 noon

Facilitated by Alberta Community Development

### REPORT

On November 26, 2005 the board of directors of the 4-H Council met at the Alberta 4-H Center in Westeros to get through as much of a full day board development seminar as possible. This is a report on that morning and has a minimum of formatting so that it can be edited, amended, and cut and pasted into the appropriate documents in the organization (e.g. Board Orientation package, Policy Manual, or Terms of Reference). The agenda provided (attached in the appendix) captured all the discussions that would take place in a full-day seminar so that the board could make decisions about what needed to be discussed that day and what could be set aside for later. In addition, that full agenda was provided to give some suggestions and guidance for those later discussions.

As a first 'context setter' for the day, participants were asked what type of board they were; Advisory, Management, and/or Governance. The board stated that they are still somewhat in a transition from an advisory board to a governance board. They still provide advisory services to the 4-H Foundation and the Branch but, otherwise, they are a fully functional governance board.

Before beginning the discussions for the morning, participants were asked what it was they personally wanted to have accomplished by the end of the seminar. Those expectations included:

- ◆ Increased learning (new board member)
- ◆ Increased awareness of 4-H
- ◆ Decision making
- ◆ Learning for the club level
- ◆ Getting buy-in
- ◆ Efficiency
- ◆ Increased leadership ability
- ◆ Communications
- ◆ Strategic thinking
- ◆ How different levels and roles work together
- ◆ Have fun
- ◆ Delegation
- ◆ Transferability to other organizations I'm involved with

As another part of the 'context setting' for the day, participants were asked to identify their vision (not a vision statement, but instead, those results they were trying to achieve over the long term) and their mission (again, not a mission statement, but instead, those activities they engaged in to achieve the vision).

## Vision & Mission (continued)

### Vision – what you’re trying to accomplish

- ◆ Youth learning and communications
- ◆ Youth – better citizens, leaders of tomorrow
- ◆ Effective working relationships, continuity from the grass roots up
- ◆ Strengthen rural communities

### Mission – what you’re doing to accomplish your Vision

#### Policy development

- ◆ Safety
- ◆ Environmental policy
- ◆ Leader screening (risk management)
- ◆ Standardization of projects
- ◆ Privacy (FOIPP)
- ◆ Member/leader expectations
- ◆ Start up/structure
- ◆ Conflict management (grievance procedures)

As a continuation of the context setting for the day, participants had a brief discussion of the major issues the organization faces over the next few years. Those included:

- ◆ Program management - adapting and improvement
- ◆ Changing definitions (and expectations) of rural, urban, and “rurban”
- ◆ Declining membership (declining rural population, smaller families, etc)
- ◆ Communications
- ◆ Moving “governance” up and down the organization
- ◆ Commitment
- ◆ Declining volunteerism
- ◆ The need for an image change

Next, participants had a discussion around Principles, Values, and Beliefs. It was suggested that they bring a set of values which drives and informs the ethical framework in which they run their day-to-day operations and, more importantly, make decisions. Ideally, they have some values around how they work together and treat each other as board members. They have a set of values that drives how they treat and relate to their ‘customers’, members, and/or volunteers. And they have a set of values around the business that they’re in and the work that they do. In small working groups, the participants developed a list for each of those areas.

## Principles, Values, and Ethics on how we treat each other:

- ◆ Model behavior
- ◆ Motivation
- ◆ Respect
- ◆ How you value each other
- ◆ Willing to listen
- ◆ Have fun with each other
- ◆ Relax
- ◆ Non-judgmental
- ◆ “Treat others as you would want to be treated”
- ◆ Trust, honesty
- ◆ Accept diversity (ability, age, race, opinion, etc.)
- ◆ Flexibility
- ◆ Balance (work/life)
- ◆ Commitment to the decisions of the Board

## Principles, Values, and Ethics on how we treat our “customers”

(First of all, who are they – Members, Leaders, Parents, Sponsors, Partners, Volunteers – in other words, the 4-H family)

- ◆ Integrity
- ◆ Trust
- ◆ Respect
- ◆ Accountability
- ◆ Responsibility
- ◆ Understanding individuality (different roles, needs)
- ◆ “Be role models and mentors”
- ◆ “Have fun”
- ◆ Open-minded and adaptable to change
- ◆ Caring and nurturing

## Principles, Values, and Ethics about the work we do, our mission

- ◆ Top down, bottom up
- ◆ Provide a safe environment
- ◆ Every member/leader/volunteer has value
- ◆ We need to provide positive role models
- ◆ We believe we can provide something for everyone
- ◆ We believe in having fun while being involved
- ◆ We believe the 4-H program develops life skills
- ◆ We believe 4-H is marketable and builds leadership skills

After the ‘principles’ discussion, board members were give three tools they might find useful in their discussions and deliberations as board members. They were:

- ◆ Four terms Board Members must be familiar with (Fiduciary Responsibility, Governance, Due Diligence, Oversight)
- ◆ Three levels of thinking and planning (Strategic, Tactical, Operational)
- ◆ The four stages people go through as they process information (Based on the Art of the Focused Conversation)

The handouts used for that presentation are attached in the appendix.

Next, participants had a long discussion around roles and responsibilities which follows.

## All Board Members

- ◆ Show up and Speak up
- ◆ Participate in at least one committee
- ◆ Bring information from the grass roots to council – take a common message back
- ◆ Bring new issues to the board
- ◆ Stay focused, ask the important questions
- ◆ Vote!
- ◆ Support board decisions once they're made
- ◆ Be a positive ambassador of the organization
- ◆ Represent (i.e. speak out for) your sector
- ◆ Remind others of “why we're here”
- ◆ Take responsibility for your personal orientation to the Board
- ◆ There are no “wrong” or “dumb” questions
- ◆ Keep the chair and the organization informed

## Chair

- ◆ Lead the board, chair the meetings (facilitate)
- ◆ Set the meeting agendas
- ◆ The formal spokesperson for the organization
- ◆ Keep time
- ◆ Listen to board members
- ◆ Play a leadership role in organizational planning
- ◆ Role model
- ◆ Questioning
- ◆ Liaison (the 4-H Foundation and the Branch)
- ◆ Relationship building
- ◆ Understand and channel levels of Board member expertise
- ◆ Delegate when appropriate
- ◆ Member of the executive committee, signing authority

## Vice Chair

- ◆ Fill the chair's role in the absence of the chair
- ◆ President-in-training
- ◆ “Actionable items” tracking
- ◆ Liaison
- ◆ Orientation (with past chair) of new Board members
- ◆ Signing authority, member of executive committee

## Secretary

- ◆ Record and distribute meeting minutes in a timely and effective manner
- ◆ Monitor delegated authority (policy)
- ◆ Board correspondence (outgoing)
- ◆ Record attendance at all meetings
- ◆ Member of the executive committee

## Treasurer

- ◆ Signing authority
- ◆ Financial “oversight”
- ◆ Budget development and tracking
- ◆ Developing, tracking and reporting on financial statements
- ◆ Signing authority, member of executive committee

NOTE: It was suggested at this seminar that this role could use some re-examination and re-evaluation. The current treasurer doesn't feel particularly engaged or that she is doing all she could or should do.

## Past President

- ◆ Repository of the organizational and Board history
- ◆ Mentor for all executive Board members
- ◆ An active member of the board
- ◆ Liaison
- ◆ Along with the Vice chair, new board member orientation
- ◆ Intuitive, helpful sensibility

## Current Standing and Ad Hoc Committees

- ◆ Finance
- ◆ Executive
- ◆ Bylaw
- ◆ Resolutions/policy
- ◆ Grievance
- ◆ Golden Clover (Awards)
- ◆ Historian
- ◆ Other ad hoc committees as and when required

There was a brief discussion about communications with the general agreement being that all communications within the organization, both up to the board and down to the clubs, needs to be repeated and reinforced, not just sent in written form. As a last exercise for the morning, each participant was asked to submit one idea for improving communications in the organization,

particularly at the board level and in informing the local clubs of board decisions and directions. Those ideas included:

- ◆ More listening and less talking (off topic)
- ◆ After regional meetings, have updates and concerns communicated right away to council chair instead of waiting for council meeting
- ◆ Listening, with full attention
- ◆ Two way communication – respond to emails/letters, forward information, issues.
- ◆ Make better use of technology (email, website, conference calls, etc.)
- ◆ Board members need to take the information back and **present** it to Regions and Districts – do not assume it will be read!
- ◆ Workshops (attendance)
- ◆ We have a Partner's Policy – we need to reactivate the formal meetings (minimum two per year) to aid in the exchange of information that needs to flow down
- ◆ A single report from council to all reps to take back to their 'regions' sent by delegate to all reps directly that can then be taken to councils in a 'like' format
- ◆ Vice President to send a group email midway between meetings regarding actionable items. Just a little reminder!
- ◆ Put more information on the 4-H website such as new proposals, focus groups, etc. What is going on provincially
- ◆ We have good policies – find ways to enforce them (district and club level)
- ◆ Use of 4-H magazine more than quarterly or more newsletters on line, website, or sent out regularly (if no email for the 4-H family)
- ◆ Orientation of new board members
- ◆ Teaching members about Council's role within 4-H
- ◆ Asking each person to tell what they want the board to do or what they want to see done
- ◆ Inform (orient) new board members. It can take a couple of meetings before you feel comfortable in speaking up

As stated at the beginning of this report, it was not possible to complete the entire agenda (a full day's activities) in just a morning and the participants were aware of that from the beginning. The agenda for a full-day seminar was circulated and is attached in the appendix of this report and can be used as a guide for future discussions of those agenda items for which there was insufficient time.

Some suggested readings:

- ◆ The Art of Focused Conversation – by The Canadian Institute of Cultural Affairs (ICA Canada) – Published by New Society Publishers ISBN 0-86571-416-9
- ◆ Better Safe – Risk Management in Volunteer Programs & Community Service – by Linda Graff and Associates Inc. ISBN 0-9684760-2-3

- ◆ Beyond Police Checks – The Definitive Volunteer & Employee Screening Guidebook – by Linda Graff and Associates Inc. ISBN 0-9684760-1-5

## Alberta 4-H Council Board Development Seminar Report November 26, 2005

### APPENDIX

- ◆ Original agenda
- ◆ Handout material

Alberta 4-H Council - Board Development Seminar

Alberta 4-H Center, RR #1, Westeros

November 26, 2005, 8:00 a.m. to 12:00 noon

Facilitated by Alberta Community Development

AGENDA

7:30 a.m. – **BREAKFAST**

### Expectations

- ◆ When we're all done here today, what is it you personally want to have accomplished?

### Principles

- ◆ What principles do we need to bring to today's discussions and to the longer term operations of this board?

### Three Gifts

- ◆ Four terms Board Members must be familiar with (Fiduciary Responsibility, Governance, Due Diligence, Oversight)
- ◆ Three levels of thinking and planning (Strategic, Tactical, Operational)
- ◆ The four stages people go through as they process information

### Stewardship (doing things right)

- ◆ Bylaws

### Roles and Responsibilities

- ◆ What are the roles of the Board and its individual members? What competencies are needed to meet these roles?

## Communications

- ◆ (What is your message, who needs to know, when do they need to know, what is the best vehicle for informing them and what will it cost?)
  - ◆ Meetings
  - ◆ Decision making/policy process
  - ◆ Protocols (e.g. re: external communications)

## Self Governance

- ◆ How do you govern/implement your authority? Where do your board members come from? What kind of succession plan do you have for replacing them and maintaining corporate memory and culture?
  - ◆ Assessing and enhancing organizational capacity
  - ◆ Policy for sustaining the board
  - ◆ Type of board and accountability
- ◆ Operational policies
  - ◆ Financial
  - ◆ Personnel
  - ◆ Program

## Creating a Culture of Strategic Thinking

- ◆ Within what kind of planning framework does the board function?

## Ethical Practices to Enhance Performance

- ◆ Can you define the ethical framework in which the board functions?

## Framework policy (Vision, Mission, ends, strategic directions)

- ◆ What are you trying to accomplish?
- ◆ In what areas do (or should) you have authority?
- ◆ In what areas should you specifically NOT have authority?
- ◆ How do you get your authority recognized and accepted by your partners?
- ◆ How does your mission/authority get changed?
- ◆ Who needs to participate in that amendment process and how would they participate?

## Advocacy

- ◆ (Political stances, proactive opportunities in community, identify those issues that may impact the work of the organization)

## Resource development

- ◆ (funding and strategic alliances)

## Program

- ♦ (environmental scanning, monitoring, evaluating, risk management) - How do you track the success of your plan, your organization, and your Board? How will you evaluate your one staff member and the board itself?

## NEXT STEPS

- ♦ What do you need to do to ensure that this day's discussions 'lands on the ground' and keeps moving forward in your organization? What documentation will be required?

## 12:00 noon – LUNCH

## THE FOCUSED CONVERSATION™

### A DECISION MAKING MODEL

“Once a society loses the capacity for dialogue, all that is left is a cacophony of voices battling it out to see who wins and who loses” (The Art of Focused Conversation)

The Focused Conversation uses questions at four levels:

### O – THE OBJECTIVE LEVEL

- ♦ questions about facts and external reality

**Some examples:** What do you see? What words or phrases stand out for you? What are some of the key ideas or images?

### R – THE REFLECTIVE LEVEL

- ♦ questions to call forth immediate personal reaction to the data, an internal response, sometimes emotions or feelings, hidden images and associations with the facts. Whenever we encounter an external reality (data/objective) we experience an internal response.

**Some examples:** How do you feel about it? Where were you surprised? What was the high point for you?

### I – THE INTERPRETIVE LEVEL

- ♦ questions to draw out meaning, values, significance, and implications

**Some examples:** What does it mean? What issues does this bring up for you? What are some deeper questions we could ask? What is this about? What other information do we need?

### D – THE DECISIONAL LEVEL

- ♦ questions to elicit resolution, bring the conversation to a close, and enable the group to make a resolve about the future.

**Some examples:** What do we need to do about it? What actions can we take? What should be our first step?

## ADVANTAGES TO USING THE FOCUSED CONVERSATION TECHNIQUE

- ◆ It is extremely versatile. It will work well with a group of strangers as well as long-term colleagues. It works with people of mixed backgrounds and ages as well as more homogeneous groups.
- ◆ It provides an excellent way to focus people on a topic long enough to determine what direction is needed.
- ◆ The process has a way of sidetracking politicking and power plays. It pushes people to be creative rather than critical.
- ◆ It provides room for real listening, people don't have to yell and fight for the floor to be heard.
- ◆ It sidetracks negative thinking. Each person's comments are received, and none are disqualified or struck from the record.
- ◆ The method applies a structure to the thinking process that prevents the conversation from drifting aimlessly.
- ◆ It allows for complete honesty: people who know that their responses will be accepted like everybody else's feel free to say what they really think and feel.

**GOVERNANCE** – there needs to be a good understanding of four major terms:

### 1. Fiduciary Responsibility

- ◆ The governance team (usually the Board of Directors) is personally and collectively responsible for the collection, management, distribution, and accounting of/for public funds (in the case of a volunteer organization, this means **ALL** funds).
- ◆ They are responsible for the “good governance” of the organization.
- ◆ The Board has the specific authority and duty to identify and monitor needs in the community, decide on the type and extent of services and activities offered, and mobilize and direct financial and human resources to support those services.

### 2. Good Governance

- ◆ The governance team functions within an ethical framework (e.g. no conflict of interest, practice proper conduct, agree to confidentiality issues, have a desire to see the organization and the community develop and grow, etc) and is primarily responsible for Policy development.
- ◆ The Board should:
  1. Establish and implement the organization's mission and vision,
  2. Set the rate of progress the organization takes in accomplishing its mission and vision,
  3. Provide continuity for the management and implementation of the organization's affairs, and
  4. Secure community support for all aspects of the organization.
- ◆ In a true Governance organization, regardless of how many employees there may be, the

governance team has only one employee (i.e. the Executive Director or equivalent) and all communications and authority should flow through that position.

3. Due diligence
  - ◆ The Board is personally and collectively responsible to ensure that all reasonable care, attention, and cautions are taken to protect people from harm (e.g. risk management).
4. Oversight
  - ◆ The Board ensures that policies are implemented through a monitoring and evaluation process/plan and, where necessary, policy interpretations are provided to staff and/or citizens.
  - ◆ There is a system of checks and balances that ensures that no one person has total, unchecked control over resources.
  - ◆ The Board has the overall responsibility for Planning for the organization and the community it serves.

Three levels of thinking, operating, and planning (from the military)

## STRATEGIC

This is the ‘big picture’ level of planning and, in military terms is about winning the overall battle. “We have to take that hill, control that crossroads, set up defensive positions where we’re vulnerable”. It is different from the other levels of planning in that it has **CLEARLY DEFINED RESULTS** and has to remain responsive to the environment, adaptable to changing situations, and nimble.

## TACTICAL

This is the middle level of planning and, again in military terms is about accomplishing specific objectives. “We need a division to take the hill, a squad to take and hold the crossroads, and a battalion to defend the vulnerable spots.” This level of planning is different from the others in that it has **CLEARLY DEFINED OBJECTIVES** and will be less adaptable without inspired leadership.

## OPERATIONAL

This is the lowest level of planning and gets down to specific tasks. Again, in military terms “We need ‘x’ bullets for each squad member, ‘y’ pairs of socks and ‘z’ liters of water”. This level of planning has **CLEARLY DEFINED TASKS** and those who function at this level rarely have the authority to be adaptable.