

VFW Education & Training Series

Leading Your  
Organization:  
(Trainer Guide)





## Leading Your Organization – VFW Educational & Training Series Trainer Booklet

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**Overview:** This workshop is designed to help a group establish priorities and create an action plan. It can be used at any level of the VFW: Department, District, Post, or Committee. It is meant to be interactive (with group participation). It can be scheduled for 1 to 4 hours depending on the available time. For a longer workshop, simply lengthen the exercise timeframes.

### **Materials Needed:**

- For this workshop, each participant will need a copy of “Leading Your Organization – Participant Handout.” The facilitator/trainer needs this booklet. There is a PowerPoint presentation to go with this. However, if you lack the equipment to show it, the workshop can be modified to do the exercises without the PowerPoint.
- Laptop, projector, and screen if available.
- The room should be arranged in work groups at tables with 4-8 people at each table.



## **Suggested script:**

### Introduction: (Slide 1)

The intent of this block of instruction is to give you something that you can use, but also to give you something to take back to your subordinate leaders and to facilitate a similar discussion with them. We're teaching you, so you can teach others. All of the materials are available to you on the Members Only section of the website.

This block of instruction is on Leadership, more specifically on Leading Your Organization, whether that be a department, district, post, or committee. We'll be using the handout on your tables that is titled "Leading Your Organization – Participant Handout." The Leadership & Development handout is a resource that I'll refer to and is available on the website.

### Mission/Vision (Slide 2)

The first step in leading is to clearly define your mission. A mission is a short, concise, and succinct statement defining an organization's purpose. It answers the question, why does your organization exist? This is the big picture. The mission drives everything else.

A starting point for the VFW mission is our Congressional Charter. Here's what it says. (slide 3) This is in your handout (p. 5).

We shortened this down to make it more succinct. (slide 4) "To foster camaraderie among veterans of overseas conflicts. To serve our veterans, the military, and our communities. To advocate on behalf of veterans." This is available on the website and also in your handout (p. 6) along with a vision statement and core values.

We have another version in this in the Leadership & Development manual in the Educational & Training Series. (slide 5) This is a good manual for



helping a leader or team to think through this process and shape their future. It reads:

The VFW believes America is defined by how it treats those who sacrificed to protect it; we believe in protecting and fighting for those who were brave enough to fight for us. Whether on Capitol Hill or in our communities, the VFW fights and defends the rights of America's veterans by lobbying for Veteran's rights, helping Veterans get the benefits they deserve, and assisting them and their families. To do less, would be an unconscionable betrayal of responsibilities as Americans and Veterans.

This manual is currently available on the website under "VFW Training & Support."

The important thing is to have a mission that motivates your post, district, or department and is in keeping with the overall mission of the VFW. If you're doing this at the committee level, it will be specific to the committee.

### Analysis

(slide 6) The next step is to take stock of your current organization and the environment around you. These are your unique circumstances. This may also be called situational awareness or environmental frame. A good tool for this is a SWOT analysis. Here's where you look internally at your strengths and weaknesses and externally at opportunities and threats. For example, declining membership may be a concern. Strong community support may be a plus. The important thing is to clearly understand your current reality.

(slide 7) This analysis should also include a discussion of what you want to be known for in your community. Consider these questions:



- What does your organization do?
- For whom?
- What value does it bring?
- What makes you different?
- What are you currently known for? What is your image in the community?
- Do you sponsor any “signature events” that you are known for? (such as a golf tournament, annual awards dinner, fish fry, bingo, etc.)

### Exercise #1

(slide 8) – Take a look at exercise 1. This handout is for you to keep so write all over it. I’d like for you to work individually for few minutes on questions 1-4. Question 1 asks you to assess your mission. After you’ve considered your mission, move on to questions 2-3. This is your SWOT analysis. It asks what is working well and what challenges you face. You can also do this as a matrix if you like that format better. Qst 4 is “What do you want to be known for?” I’ll give you 5 minutes to work alone on this. (Pause for 5 minutes.)

Now talk about your answers with others at your table. Add to your own list if this sparks some other ideas. (Give them 5-15 minutes to work in the group.)

(Get their attention to share their answers with the entire group.) Ask:

- Did anybody make changes to the mission statement?
- Who would like to share one of their strengths, weaknesses, opportunities or threats with the group? (Get several people to contribute ideas.)
- What do you want to be known for?



## Goal Setting

(slide 9) Once you have clearly defined your mission and analyzed your environment, it's time to set goals. Most people have goals in their head, but it's important to write them down. (read quotes)

Think of this as setting your priorities – what's most important to you.

## Exercise #2

(slide 10) You probably have a dozen things you want to accomplish. For now, let's focus on the top 3. Take a few minutes to write those down, and give some thought to why each is important to you. Think about what you want your organization to be known for, what you want to change, or what you want your legacy in leadership to be. Look back to your answers on page 1 for ideas. These may be one year goals or they can be further out. Work in your groups to discuss goals, and write down the ones that are right for you. Then write a statement for each as to why it's important. (10-20 minutes)

## Review of Exercise 2 together –

Ask: What are some of your goals? (Get their ideas. Below is a list of things that may come up or that you can add if needed.)

### Possible Goals:

- 100% membership, All American
- Increase community service projects
- Create partnership with student veterans organization at local college
- Partner with other veterans' organization such as Team RWB
- Plan activities of interest to younger members
- Do more for local reserve unit
- Do more training for posts
- Improve our image in the community



- Renovate the post home
- Improve communications among members

### Action Plan –

(slide 11) Goals tend to be big things, so now you need to break it down into manageable action items. You need to identify the objectives, or practical steps needed to achieving your goals. The best objectives and strategies follow the “SMART” rule. They are Specific, Measurable, Achievable, Relevant, and Time-bound, meaning they have deadline or milestones. You need to be able to recognize when they have been accomplished. Something like “improve member participation” is hard to measure. Something like “plan 2 social activities and 1 community service project by Dec 31” is easy to measure.

### Exercise #3

(slide 12) Now take a look at Exercise 3. Talk within your groups about what steps you might take to achieve your goals. We won't have time for everyone to list all their strategies for each goal, but work through the process on as many as you can. Consider both the steps for achieving your goals and who you will ask to take the lead on each action. (10-30 minutes)

### Review of Exercise 3 -

Let's share 2-3 examples with the group of what you came up with. Who would like to volunteer? (Once again get examples from the group.)

### Next Step -

(slide 13) When you get back to your organization:

1. Meet with your core leadership team and refine your mission, goals, and action plan. Discuss goals that may take more than one year to achieve and how you will assure continuity between commanders.



Decide who will take the lead on each action. Create milestones for each action.

2. Share the mission, goals, and action plan with your organization. Get their support and involvement in achieving the goals and carrying out the plan.
3. Be prepared to modify if needed.

Now, obviously, you don't achieve this by yourself. The key is to form the right team, and get as many people as possible involved in helping to make the department, district, post, or committee successful.

### Leadership -

(slide 14) – We'll do this last exercise together. In the military, leaders often have their own "Commander's Leadership Philosophy" which they write down to provide guidance or reminders to themselves and subordinate leaders. It tells what mattered to them. What leadership principles will guide you as you execute your plan? How will you lead others to success? (Lead a 5-minute discussion of leadership traits and principles. Leave the screen blank during the discussion. Then use the PowerPoint to summarize or emphasize key points)

#### Leadership –

- Get the right people on your team. Appoint people who are dependable, knowledgeable, and motivated.
- Be a good mentor. Teach when needed, but give them room to do it their way. Give good feedback. Tell them "what" but not "how". Give them room for initiative and creativity.
- Have tools for reporting and measuring results. People do what the boss checks. Be specific in your expectations.
- Be a role model for others in attitude, action, and integrity.
- Focus on what's important.



- Communicate clearly and frequently. Have open 2-way communication.

I have a few quotes on leadership to leave you with (slide 15). (Read the quotes or add your own.)

Your job is bring out the best in others and provide direction and focus.

### Conclusion –

This concludes this section of the training. I encourage you to take this back both to work on your own plan and to train others. Thank you for your attention this afternoon.

Contact for suggestions to improve this training module: Debra Anderson, [danderson@vfw.org](mailto:danderson@vfw.org)

Leading Your Organization, VFW Educational & Training Series  
Developed Nov 2015 by Debra Anderson, VFW



