

# Taking The Long View

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Airline pilots, as evidenced by the requirements of their chosen profession, are exceptional planners. Before every departure, the flight crew must calculate a number of variables that could affect their flight—reviewing their route, checking weight and balance, assessing weather, etc. Before every pushback, airline pilots must compute fuel requirements, consider NOTAMs, and evaluate air traffic delays.

ALPA leaders can rely on this same pilot discipline—the strict adherence to careful planning balanced by operational flexibility—to advance the interests of their pilot groups. With daily news reports detailing a seemingly never-ending barrage of threats to the airline piloting profession, ALPA members must determine the best course of action for prepar-

How to use  
strategic planning  
in leading your  
pilot group.

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ing for the future, protecting their profession, and enhancing their careers.

Earlier this year, ALPA assessed its long-term prospects and created a new, proactive strategy for strengthening its role as the world's largest union of airline pilots. After Executive Council review, ALPA's president and general manager unveiled this strategic plan in March. The plan makes greater use of Association resources and provides enhanced services to ALPA members. Individual pilot groups can benefit from the same strategic planning process that the Association itself recently underwent by taking advantage of the strategic planning resources that ALPA makes available to them.

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“Strategic planning is a process that enables pilot groups to understand their current environment and visualize the future to determine the most effective strategies for reaching their goals,” says Bruce York, director of ALPA's Representation Department. “It helps pilot group leaders identify the necessary tools, recognize opportunities and obstacles to completion of goals, and establish a time line for implementing and periodically benchmarking programs to attain the pilot group's objectives.”

Ideally, pilot groups should not wait until faced with a crisis before engaging in strategic planning. Assessing long-term prospects is more difficult when immediate concerns require attention. Strategic planning earlier, rather than later, ensures that a pilot group will be able to function proactively when a crisis occurs instead of simply reacting to events.

“It's obviously easier to plan when things are calm,” says York, “so that when you're faced with adverse circumstances, you've already anticipated the source of possible problems—merger, bankruptcy, defined-benefit-plan termination—or opportunities that provide bargaining leverage.

“Because the time line for analyzing problems, getting direction from the pilot group, and building consensus is long, the most difficult time for dealing with unresolved issues and a lack of common vision within a pilot group is when you're looking at a crisis.”

A number of ALPA pilot groups have formulated strategic plans in recent years. Many of these efforts

ALPA has developed a template for strategic planning that includes the essential elements that are common to all effective strategic plans.

have been quite successful in advancing the interests of pilots at various airlines. Pilots of Alaska, America West, Continental, Delta, Hawaiian, United, and US Airways have all been through the strategic planning process. Before merging with ALPA, the FedEx pilot group also went through a similar process that they called Vision 2004 to outline their pilot group goals and to identify the resources they needed. This exercise clarified for them what resources they would need to successfully negotiate their next contract and, in part, formed the basis for their decision to reaffiliate with ALPA.

“After the challenges we faced in achieving our first contract, we realized that to succeed in our next round of negotiations we would need to identify our goals and develop a comprehensive strategic plan to reach them well before exchanging openers with FedEx management,” says Capt. David Webb, FedEx Master Executive Council chairman. “By formalizing milestones and understanding the resources needed to achieve them, we have been better prepared to handle changing circumstances and not lose sight of our primary goals that we outlined in Vision 2004.”

A team of senior ALPA staff members in the Communications, Representation, and Economic and Financial

Analysis Departments typically helps pilot leaders undertake this process. It usually starts with an analysis of the airline industry, an analysis of the carrier, and a review of pilot group issues.

The process also helps the pilot group evaluate opportunities and risks, set short- and long-term goals, create programs to achieve those goals, and establish a time line for implementation.

“Various components within a strategic plan help us figure out what’s going on at a particular pilot group and anticipate where it might be headed in the future,” says Marie Schwartz, a manager in ALPA’s Communications Department. “We always want to know as much as we can about the pilot group, what they’re dealing with, what their long- and short-term goals might be, and their time line for achieving those goals. But ultimately, one pilot group’s strategic plan will be different from any other group’s because each group’s plan will depend on the culture of that group, the pilots’ relationship with management, and the obstacles they’re facing.”

While MECs are encouraged to take advantage of the training and planning resources that are available, implementing and periodically reviewing the plan once it’s been created is just as important. A well-written plan collecting dust on a shelf somewhere won’t do much to help advance the interests of the pilot group.

“You can write up a very impressive plan, but if you don’t do anything with it, it’s just a waste of everyone’s time,” says Schwartz. “Strategic planning is a great tool, but it’s something for which a pilot group has to be accountable and take responsibility.”

“Managing any organization without some sort of strategic plan is very difficult, especially if that organization is a labor union,” says Jeff MacDonald, a supervisor in ALPA’s Representation Department. “Otherwise, you just fritter away all your time. If the pilot group goals and objectives aren’t clear, and nothing is driving you to manage your time and resources, you won’t accomplish anything because you’ll always be responding to the crisis *du jour*.”

“Most people come to their leadership roles in ALPA by getting involved in a crisis. They get their start by putting out fires,” says MacDonald. “Strategic planning

requires a shift from the daily firefighting to managing fairly complicated democratic organizations, but that must be done so that over time they can accomplish their goals.”

While having a strategic plan is always important, charting their own course has never been more crucial for ALPA members as they try to navigate the often-treacherous waters of the present-day airline industry. Just as ALPA has had to reassess its own long-term strategy, individual pilot groups should consider the challenges, resources, and opportunities that will affect their futures as they persevere during this difficult period.

“We are at a critical time in the history of our union,” says ALPA’s president, Capt. Duane Woerth. “Our profession is assailed on a daily basis by those who would take away much of what this Association has spent the last 75 years fighting for. If we hope to protect the interests of our members, it is essential that we plan beyond our present moment. Strategic planning is the key to securing our future.”

“We’d really like to see broader use of this resource,” says York. “We’d like to find out which pilot groups would really benefit from this process over the next five years or so and get them to take advantage of it. It’s one of the tools in the ALPA toolbox, and it’s available to any pilot group that is interested in it.”

The airline industry is different today from what it was a decade ago, and it requires new and different strategies to effectively plan for the future. Association officers and staff are working hard to make sure that ALPA remains viable and relevant to its members and a decisive force in the future of the airline industry. Committing to long-term strategic planning will help pilot groups deal with the new realities of their industry.

“If we’re going to be successful, we have to be smart,” says Capt. Woerth. “The way to be smart is to develop and implement strategic plans that will help us to achieve our long-term objectives.”

Pilot group leaders interested in drafting a strategic plan should contact ALPA’s Representation Department. More information is available on the web at [Crewroom.alpa.org](http://Crewroom.alpa.org).