Planning for Social Change: Customizing Strategic Planning to Fit Your Agency
Facilitator: Carolyn Sullivan, New Chapter Coaching
August 28, 2019, 3:30 – 5:00 p.m.

Designing the Process
1. What lessons did you learn from your last planning cycle that you want to apply to this planning cycle?

________________________________________________________________________

________________________________________________________________________

2. Before we launch our strategic planning process, we need to engage in the following work (check all that apply):

   - Board development
   - Team building
   - Onboarding of a new executive director
   - None/Not applicable
   - Other: ____________ (please specify)

3. We will use the expert services of an external strategic planning consultant for some or all of the planning process (check one):

   - Yes, for all the process
   - Yes, for some of the process. Please specify: ________________________________
   - No, we can handle it on our own.
   - Not sure

4. The planning process will be driven by (check one):

   - Executive director alone
   - Executive director and Board President/Chair
   - Planning team. If so, please specify who will be on the team: ________________

   ________________________________________________________________

   ________________________________________________________________

   ________________________________________________________________

   _____________ (please specify)
5. The 2-3 best practices most important to us for this planning process are (check 2-3 items from accompanying document):

____________________________________________________
____________________________________________________
____________________________________________________

6. We will build our strategic plan on data gathered and analyzed from the following sources (check all that apply):

- Comprehensive community needs assessment
- CCAT/org assessment
- SWOT analysis (strengths, weaknesses, opportunities, and threats)
- Employee survey(s) (satisfaction, engagement, etc.)
- Board survey (self-assessment)
- External stakeholder survey
- Trend statements
- Agency accomplishments
- Performance under last strategic plan
- Monitoring reports

7. This planning cycle, we’ll need to revisit and possibly revise our (check all that apply):

- Mission statement
- Vision statement
- Values statements
- Other: ____________ (please specify)

8. Our planning term will be (check one):

- One year
- Three years
- Five years
- Ten years
- Other: ____________ (please specify)
9. Our planning process will take place from _________ to _________ (enter months) with the goal of receiving board approval of the plan no later than _____________.

10. Resources for strategic planning include the following:
   a. Time (How much time do you have for this project considering other work on your plates?):
   
   b. Talent (What talents/experience can be leveraged?):
   
   c. Treasury (What resources are available/can be acquired or applied to this task?):

**Implementing the Process**

11. The following groups of people will participate in the planning retreat (check all that apply):
   
   o Board members (_____ = # of board members expected)
   o Leadership team members. (_____ = # of leadership team members expected)
   o All staff members. (_____ = # of staff members expected)
   o Other: ______________ (please specify)

12. We’ll seek out a retreat space with the following qualities (check all that apply):

<table>
<thead>
<tr>
<th>Accessibility for all participants</th>
<th>Comfortable chairs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good lighting</td>
<td>Wall space for flip chart papers/sticky wall</td>
</tr>
<tr>
<td>Space to move around</td>
<td>Access to outdoor space</td>
</tr>
<tr>
<td>Ability to bring food in</td>
<td>Technology</td>
</tr>
<tr>
<td>Hotel accommodations</td>
<td>Other: ______________ (please specify)</td>
</tr>
</tbody>
</table>
13. We have this much time to spend on a planning retreat (check one):
   - ½ day
   - Full day
   - 1 ½ days
   - Two days
   - Series of 2-3 non-successive ½ days
   - Other: ____________ (please specify)

14. We’ll measure the success of our planning process by whether we achieve the following outputs/outcomes:

   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________

It’s important to remember that while there are many ways in which you can customize the planning process (and plan) to make it meet your agency’s needs and culture, it must meet the Category Six (Strategic Planning) Organizational Standards. These are as follows:

**Category 6 Standards**

**Standard 6.1.** The organization has an agency-wide strategic plan in place that has been approved by the governing board within the past 5 years.

**Standard 6.2** The approved strategic plan addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.

**Standard 6.3** The approved strategic plan contains family, agency, and/or community goals.

**Standard 6.4** Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.

**Standard 6.5** The governing board has received an update(s) on progress meeting the goals of the strategic plan within the past 12 months.