



Strategic Planning Session

Agenda

For a team of people embarking on a strategic planning session, these are some likely steps that a group may want to achieve.

1. Introductions
2. Our External Environment – SWOT
3. Brainstorm attributes of our “Organization without Constraints”
 - ◆ “In a world with no constraints, what would be happening with our clients, employees, products, programs, services, and financial sustainability?”
4. Identify what we need to:
 - ◆ Keep doing?
 - ◆ Stop doing? and
 - ◆ Start doing?
5. Build a Strategic Framework
 - ◆ Refine the organization’s Vision Statement
 - ◆ Identify several Pillars of Success; and for each,
 - Set Strategic Objectives;
 - Create Measures; and
 - Agree on Key Initiatives
6. Consider next steps, including communicating the Strategic Framework
7. Adjourn.

Some Tips About Organizing the Strategic Planning Session:

If you have not already identified the participants and the location for the session, the following comments may be helpful:

1. More than six people is desirable, and less than 20 people is manageable for a moderately trained Leader. More participants put more demands on the facilitator and may require multiple breakout groups throughout the session.
2. Off-site locations are best because they reduce the potential for interference.
3. Plan for food and beverages to be provided for breakfast, mid-morning break, lunch and mid-afternoon break.
4. It is not necessary for everybody in an organization to participate, but it is necessary to gather a well-qualified group of people to represent those who are not in attendance. You need to determine who will participate including management, and other employees. As a general rule, the most senior people in the organization should participate. Participants from other parts of the organization, who can provide useful perspectives and knowledge, should also be considered.
5. Participants need to make a commitment to stay with the process from start to finish. It is difficult for people to join a session having not experienced any prior segments.
6. Because everyone is not participating, the Strategic Planning Group should communicate to the rest of the organization the purpose of the sessions and indicate that the results of the sessions will be very transparent.

If you are deciding how to set up the facility and equipment requirements, the following may be helpful:

1. It is recommended that you find a facility that has a room large enough to host a meeting with a U-shape formation of chairs and tables and with sufficient wall space to mount flipchart papers as the session proceeds.
2. You should also be able have your breaks and lunch at the same location.
3. At the head of the open section of the U-shape formation there should be a table for equipment and the facilitator's materials. At the front of the room there should be a screen to project a PowerPoint presentation. Also, at the front of the room there should be three flip charts, equipped with a sufficient quantity of colored flipchart markers. There should be a sufficient quantity of masking tape at each of the flip charts.
4. On the facilitator's table there should be sufficient room to place a computer and projector to support the PowerPoint presentation as well as other supporting materials.
5. At each of the participant's places there should be:
 - Medium-sized tent card
 - Felt marker (fine)
 - Post it notes
 - Paper and pen

