

Strategic Planning Roadmap for Mission-Driven Organizations



| Onboarding | Decisions | Sample Agenda (copy and enhance size) |
|--|--|---|
| <p>1. Initial meeting with CEO and Leadership Team</p> <p>2. First Meeting of the Planning Committee Prework</p> | <ol style="list-style-type: none"> Who should attend? Selection of the planning committee What background documents, surveys, and prior research are needed? Proposed format and timeline of the strategic planning process Milestones, meeting schedules, status reporting Communications plan | <p>Onboarding Meeting Agenda September 5, 2024 9:30 – 11:30am</p> <ol style="list-style-type: none"> Introductions – round robin Introduction to LJS, LLC Agenda Review Expectations Proposed process for strategic plan development and roadmap Deliverables Communications plan and status reporting process Planning Committee formation Questions and Concerns Next Steps Meeting Schedule <p>Attendees: Charles Daniel, CEO cdaniel@ljs.com Felicia Michalek, Treasurer fmichalek@ljs.com Linda Johnson, CEO ljohnson@ljs.com</p> |
| Phase One: Vision and Mission | Questions to answer | Example (copy and enhance size) |
| <p>Uncover opportunities and identify risks to moving your organization to the next level.</p> <p>Data Analysis</p> <ol style="list-style-type: none"> SWOT Analysis PWESTLE Analysis Annual Report <p>Vision, Mission, and Values</p> | <ol style="list-style-type: none"> How will we make the world better in the future? What have been the organization's Strengths, Weaknesses, Opportunities, and Challenges/Threats? What skills, resources, personnel, systems, and processes must be improved upon, enhanced, redesigned, hired, etc., to prepare us for our envisioned future? What financial, environmental, demographic, and political realities will impact our mission? What are our immutable values? What leadership pipeline must be in place to equip a steady supply of high [potentials as individuals retire or move out of the organization? | <p>PSYCHIATRIC CENTER</p> <p>Our Vision A future where all residents of [redacted] feel their mental health and wellbeing are respected and supported and services are equitably accessible to all, delivered in an appropriate and culturally relevant manner.</p> <p>Our Mission [redacted] facilitates and provides expert, specialized behavioral health services for residents of [redacted] on site and in the community. We support the emotional-social well-being of individuals and families so that they may live rooted in hope, dignity, and purpose.</p> <p>Our Strategy Advance the delivery of high-quality, equitable behavioral health care services through an unwavering commitment to compassion, collaboration, and innovation.</p> <p>Our Values "We Care More" Through:</p> <ul style="list-style-type: none"> More candor – Say the "thing" More curiosity – Ask the question More collaboration – Offer and accept help More creativity – Try something new More compassion – Do it with your whole heart |

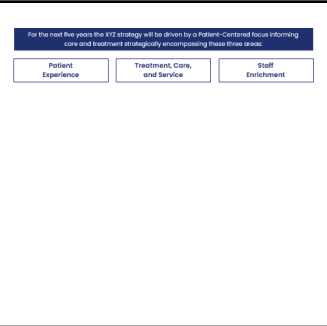
Phase Two: Thematic Goals and Objectives

What overarching themes will guide the strategies to help us carry out our mission?

Example
(copy and enhance size)

Choose up to three thematic goals under which your strategies will lay.

Decide on the S.M.A.R.T. goals.



Phase 3: Operational Plan

Measures metrics

Sample
(copy and enhance size)

Decide tactics (goals and objectives) to achieve the strategic goals successfully.

Set a timeline for activities (Preferably from one to three years. Five-year plans are also acceptable. Do this for each department being planned for.

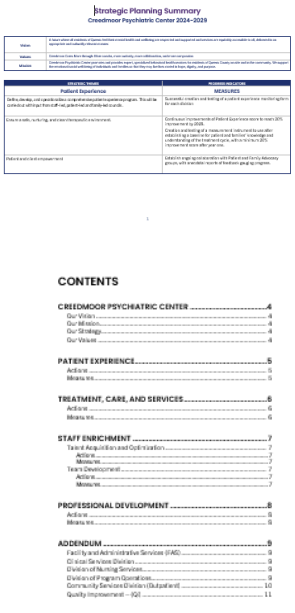
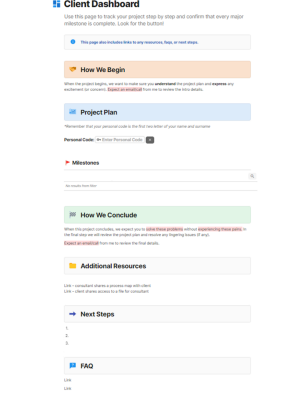
- Set Key Performance Indicators (KPIs) for each Key Results Area (KRA)
- Create a timeline with milestones, action plans, and individuals or groups responsible for each activity.

Informational Plan Chart

Build a diverse network of public and private stakeholders that includes individual residents, City agencies and programs, community providers, local health organizations, businesses, and other diverse members of groups that are actively engaged in governance and leadership.

Outcomes: The CDF is recognized as a community coalition led by and accountable to the community and through which relevant partners can gain access to public leaders, organizations, and knowledge.

| Objectives | Activities Year 1 (2020) | Activities Year 2 (2021) | Public Considerations |
|--|--|--|--|
| A. Increase services from among individual leaders and residents, public and private organizations, health care providers, non-profit community groups, and other community stakeholders. | <ul style="list-style-type: none"> Conduct community assessment activities and surveys. Continue to build expertise through knowledge. Expand the database listing residents and non-profit organizations via email and in-person outreach. Annual or bi-annual meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. | <ul style="list-style-type: none"> As a formal assessment of partner membership in identifying in-person and virtual participation opportunities. Continue to build expertise through knowledge. Expand the database listing residents and non-profit organizations via email and in-person outreach. Annual or bi-annual meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. | <ul style="list-style-type: none"> As the CDF grows, we will make an effort to establish personal relationships with and between the partners. This will include periodic one-on-one meetings and building trust and rapport. An effort will be made to ensure that all partners feel valued and included. |
| B. Support public service, government leaders and/or Community involvement in leadership roles where they can influence decisions. | <ul style="list-style-type: none"> Form Governance Team. Outreach to youth leadership at high school within the District through District College Student Association. Invite CA and PA/PTA members to participate in Governance Team and CDF activities. Invite CA, PA/PTA members and youth to meet in-person and virtually. Support CA to present and participate in panels/discussions on their respective the CDF. Invite and encourage grassroots leaders to spread the word about opportunities to write to government officials regarding pressing issues (i.e., Act Now Movement, CA's the Children's Environmental Health Initiative). Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. | <ul style="list-style-type: none"> Form Governance Team. Outreach to youth leadership at high school within the District through District College Student Association. Invite CA and PA/PTA members to participate in Governance Team and CDF activities. Invite CA, PA/PTA members and youth to meet in-person and virtually. Support CA to present and participate in panels/discussions on their respective the CDF. Invite and encourage grassroots leaders to spread the word about opportunities to write to government officials regarding pressing issues (i.e., Act Now Movement, CA's the Children's Environmental Health Initiative). Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. Attend community meetings, events held for community leaders and other interested parties. | <ul style="list-style-type: none"> Through this process, the leadership will bring a more up and open communication to areas whether CA and community leaders have met they have greater influence in decision-making. An effort will be made to ensure that all partners feel valued and included. Through this process, the leadership will bring a more up and open communication to areas whether CA and community leaders have met they have greater influence in decision-making. An effort will be made to ensure that all partners feel valued and included. Through this process, the leadership will bring a more up and open communication to areas whether CA and community leaders have met they have greater influence in decision-making. An effort will be made to ensure that all partners feel valued and included. Through this process, the leadership will bring a more up and open communication to areas whether CA and community leaders have met they have greater influence in decision-making. An effort will be made to ensure that all partners feel valued and included. |

| Phase 4 - Strategic plan draft(s) | Format* typical | Two Format Styles |
|---|---|---|
| | <p>Draft includes:</p> <ul style="list-style-type: none"> ● Cover ● Preamble ● Executive Summary ● Vision, mission, and goals ● Company Wide thematic goals ● Goals, Objectives, action steps, and timelines for each department involved. ● 1-5-Year Operational Plan by Division. <p>Appendix - Strategy Execution Plan-Meetings, measures, and formats for monitoring and communicating progress.</p> |  <p>Strategic Planning Summary Creemador Psychiatric Center 2024-2028</p> <p>CONTENTS</p> <p>CREEMADOR PSYCHIATRIC CENTER 4 Our Vision 4 Our Mission 4 Our Strategic 4</p> <p>PATIENT EXPERIENCE 5 Action 5 Measures 5</p> <p>TREATMENT, CARE, AND SERVICES 6 Action 6 Measures 6</p> <p>STAFF ENRICHMENT 7 Talent Acquisition and Organization 7 Action 7 Measures 7 Staff Development 7 Action 7 Measures 7</p> <p>PROFESSIONAL DEVELOPMENT 8 Action 8 Measures 8</p> <p>ADDENDUM 9 Facility and/or Other Services (FMS) 9 Division of Health Services 9 Division of Program Operations 9 Community Services Division (Outpatient) 10 Quality Improvement 11</p> |
| Phase 5: Final Draft | Components | |
| <p><i>An editable document is print-ready and can be modified by the company as needed and used as a template for future plans.</i></p> | <p>The cover, executive summary, table of contents, and plan are professionally designed and bound with your company’s logo and supporting documents.</p> | |
| <p>Implementation Plan Evaluation Review Meetings, Milestones Client dashboard</p> | | <p>Sample (copy and enhance size)</p> |
| <p><i>Under guidelines set forth in the contract, the implementation plan may be included or added separately. General Execution Guides are standard.</i></p> <p><i>Project milestones and status reports will be available on a CODA client dashboard.</i></p> | TBD |  <p>Client Dashboard</p> <p>Use this page to track your project steps for this and confirm that every major milestone is complete. Look for the button:</p> <ul style="list-style-type: none"> • How We Begin • Project Plan • Milestones • How We Conclude • Additional Resources • Next Steps • FAQ |

Format Options, Cost, and Requirements

One Day - \$3,500

5-Day \$12,500 plus *\$4,000 optional follow-up meetings and up to four draft revisions within four weeks.

*** Additional contract required. The cost depends on the extent of necessary revisions.**

6 Months - \$4,000/month retainer

Two-Day Retreat - \$5,000

Requirements and Prerequisites

***An executed contract and a deposit are required before each planning configuration.*

| Format | Requirements |
|-----------------|--|
| One Day | The Company secures the site unless otherwise specified. Payment is in advance. The company provides all refreshments or includes them in the contract if they are local. The company also provides A/V equipment. |
| 5-Day | The Company secures the site, including refreshments and A/V equipment. |
| 6-month | The Company secures the site and clears the schedule of all involved. Administrative support and/or a communications liaison must be designated. Regular meetings to touch base must be prescheduled. |
| Weekend Retreat | The company secures the site, and LJLS and the company mutually agree on a date, travel, and other expenses that the company covers separately from the planning contract. |

The goal of this **checklist** is to:

- Clarify our methods and how we can partner
- This will help you assess your company's capacity and preference for conducting the planning process and plan your budget.
- Reduce misunderstanding and confusion.

