

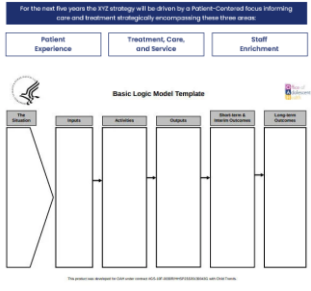


Strategic Planning Roadmap for Mission-Driven Organizations

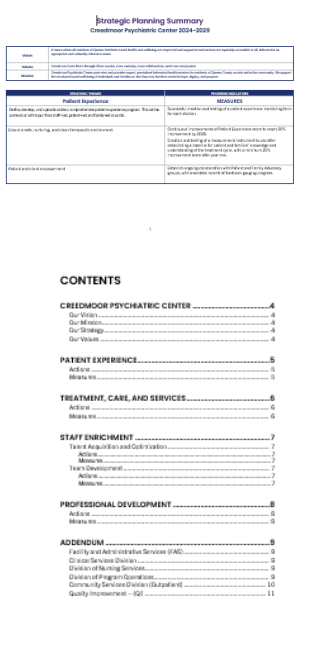


Onboarding	Decisions	Sample Agenda (copy and enhance size)
<p>1. Initial meeting with CEO and Leadership Team</p> <p>2. First Meeting of the Planning Committee <i>Prework* to be determined by the planning team and LJLS.</i></p>	<ol style="list-style-type: none"> Who should attend? Selection of the planning 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 	
Recap and Current State	Optional formats	SWOT Analysis
<p>The purpose is to examine the current state and progress on previously set goals and metrics, if applicable, to inform future strategies.</p> <p>To identify recurring issues and devise solutions to challenges that may have hindered goal achievement.</p>	<ol style="list-style-type: none"> It is most often handled in depth at the first phase of a planning retreat, and it involves uncovering opportunities and identifying risks to moving your organization to the next level. It can also be conducted as part of onboarding. <p>The SWOT analysis is just one of several tools to be employed.</p>	

<p>Phase One: Vision and Mission</p>	<p>Questions to answer</p>	<p>Example (copy and enhance size)</p>								
<p><i>Uncover opportunities and identify risks to moving your organization to the next level.</i></p> <p>Data Analysis</p> <p>1. SWOT Analysis</p> <p>2. PWESTLE Analysis</p> <p>3. Annual Report</p> <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</p> <p>A future where all residents of ██████ feel their mental health and wellbeing are respected and supported and services are equitable, accessible to all, delivered in an appropriate and culturally relevant manner.</p> <p>Our Mission</p> <p>██████████ promotes and provides expert, specialized behavioral health services for residents of ██████ on-site and in the community. We support the emotional, social well-being of individuals and families so that they may live lives rooted in hope, dignity, and purpose.</p> <p>Our Strategy</p> <p>Advance the delivery of high-quality, equitable behavioral health care services through an unwavering commitment to compassion, collaboration, and innovation.</p> <p>Our Values</p> <p>"We Care More"</p> <p>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 								
<p>Phase Two: Thematic Goals and Objectives</p>	<p>What overarching themes will guide the strategies to help us carry out our mission?</p>	<p>Example (copy and enhance size) of thematic goals and Logic model</p>								
<p><i>Choose up to three thematic goals under which your strategies will lay.</i></p> <p><i>Decide on the S.M.A.R.T. goals.</i></p>	<p>Use a Logic Model to justify the choice of thematic goals and strategies.</p>	 <p>For the next five years the KPI strategy will be driven by a Patient-Centered Social Inequality, Care and Treatment Model strategically encompassing these three areas:</p> <p>Patient Experience Treatment, Care, and Service Staff Enlightenment</p> <p>Basic Logic Model Template</p> <p>The Problem Inputs Activities Outputs Short-Term Outcomes Long-Term Outcomes</p>								
<p>Phase 3: Operational Plan</p>	<p>Measures/ metrics</p>	<p>Sample (copy and enhance size)</p>								
<p><i>Decide tactics (goals and objectives) to achieve the strategic goals successfully.</i></p> <p><i>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.</i></p>	<ul style="list-style-type: none"> Select relevant metrics that include quantitative as well as qualitative data. Include financial, community impact, programmatic data, and outcome targets. Set Key Performance Indicators (KPIs) for each Key Results Area (KRA) 	<p>Implementation Plan Chart</p> <p>Goal 1: Building Relationships Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p> <p>Customer: The plan is developed as a community coalition activity and accessible to the community and through which external partners can gain access to credible leaders, organizations, and knowledge.</p> <table border="1"> <thead> <tr> <th>Objective</th> <th>Initiative Year 1 (2020)</th> <th>Initiative Year 2 (2021)</th> <th>Success Combination</th> </tr> </thead> <tbody> <tr> <td> <p>Objective 1: Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p> <p>Initiative 1.1: Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p> </td> <td> <p>Conduct community assessment and identify and convene a diverse group of stakeholders.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p> <p>Conduct community assessment and identify and convene a diverse group of stakeholders.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p> </td> <td> <p>Conduct a formal assessment of partner membership to identify gaps in membership.</p> <p>Continue to build ECOP membership.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p> <p>Conduct community assessment and identify and convene a diverse group of stakeholders.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p> </td> <td> <p>Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p> <p>Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p> </td> </tr> </tbody> </table>	Objective	Initiative Year 1 (2020)	Initiative Year 2 (2021)	Success Combination	<p>Objective 1: Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p> <p>Initiative 1.1: Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p>	<p>Conduct community assessment and identify and convene a diverse group of stakeholders.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p> <p>Conduct community assessment and identify and convene a diverse group of stakeholders.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p>	<p>Conduct a formal assessment of partner membership to identify gaps in membership.</p> <p>Continue to build ECOP membership.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p> <p>Conduct community assessment and identify and convene a diverse group of stakeholders.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p>	<p>Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p> <p>Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p>
Objective	Initiative Year 1 (2020)	Initiative Year 2 (2021)	Success Combination							
<p>Objective 1: Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p> <p>Initiative 1.1: Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p>	<p>Conduct community assessment and identify and convene a diverse group of stakeholders.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p> <p>Conduct community assessment and identify and convene a diverse group of stakeholders.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p>	<p>Conduct a formal assessment of partner membership to identify gaps in membership.</p> <p>Continue to build ECOP membership.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p> <p>Conduct community assessment and identify and convene a diverse group of stakeholders.</p> <p>Request that attendees bring business and expertise.</p> <p>Conduct initial meetings, build trust, and establish relationships and other ECOP meetings.</p>	<p>Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p> <p>Build a diverse network of stakeholders and private stakeholders that include individual residents, City agencies and programs, community providers, local-based organizations, business, and other cross-sector groups that are actively engaged in governance and leadership.</p>							

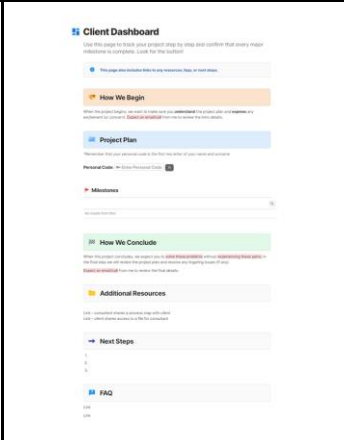
	<ul style="list-style-type: none"> ● Create a timeline with milestones, action plans, and individuals or groups responsible for each activity. ● Agree on and outline specific metrics for each activity or process to be measured. Select inputs essential for successful milestone achievement. 	<table border="1"> <thead> <tr> <th>Objectives</th> <th>Activities Year 1 (2020)</th> <th>Activities Year 2 (2021)</th> <th>Future Considerations</th> </tr> </thead> <tbody> <tr> <td>Governance and Leadership</td> <td> <ul style="list-style-type: none"> File necessary (501(c)(3) and 1 Administrative Assistant) Form Governance Team Outreach to youth leadership at high school within the District and through Boulder College Student Association Invite CA and RA/PA members to participate in Governance Team and ECEP committees </td> <td> <ul style="list-style-type: none"> Hold quarterly meetings to discuss needed policy changes Youth, Parents, CA and other groups/committees form peer control responsibilities that will support and help inform emerging leaders </td> <td> <ul style="list-style-type: none"> Throughout this process, the leadership will stay in close and open communication to address whether CA and community leaderships feel they have greater influence in decision-making, do self-lead, and provide team building activities and workshops. </td> </tr> <tr> <td>4. Support youth, parents, providers, leaders and/or Community Administrative Leadership roles where they can influence decisions</td> <td> <ul style="list-style-type: none"> Invite CA, RA/PA, employees and youth to lead initiatives and knowledge share events Support CA to present and participate in panel discussions at these events for ECEP Inform and Encourage grants/contracts to access the most direct government officials regarding program design (e.g. ACT Now: Present CA to the Children's Behavioral Health Services) Involve identifying strategies for CA and resident leaders that go into grant proposals for funding Identify opportunities for CA and participants build that knowledge base </td> <td> <ul style="list-style-type: none"> Identify and recruit staff to create needed CA's and other leadership opportunities ECEP is lead facilitator and primary guide </td> <td></td> </tr> </tbody> </table>	Objectives	Activities Year 1 (2020)	Activities Year 2 (2021)	Future Considerations	Governance and Leadership	<ul style="list-style-type: none"> File necessary (501(c)(3) and 1 Administrative Assistant) Form Governance Team Outreach to youth leadership at high school within the District and through Boulder College Student Association Invite CA and RA/PA members to participate in Governance Team and ECEP committees 	<ul style="list-style-type: none"> Hold quarterly meetings to discuss needed policy changes Youth, Parents, CA and other groups/committees form peer control responsibilities that will support and help inform emerging leaders 	<ul style="list-style-type: none"> Throughout this process, the leadership will stay in close and open communication to address whether CA and community leaderships feel they have greater influence in decision-making, do self-lead, and provide team building activities and workshops. 	4. Support youth, parents, providers, leaders and/or Community Administrative Leadership roles where they can influence decisions	<ul style="list-style-type: none"> Invite CA, RA/PA, employees and youth to lead initiatives and knowledge share events Support CA to present and participate in panel discussions at these events for ECEP Inform and Encourage grants/contracts to access the most direct government officials regarding program design (e.g. ACT Now: Present CA to the Children's Behavioral Health Services) Involve identifying strategies for CA and resident leaders that go into grant proposals for funding Identify opportunities for CA and participants build that knowledge base 	<ul style="list-style-type: none"> Identify and recruit staff to create needed CA's and other leadership opportunities ECEP is lead facilitator and primary guide 	
Objectives	Activities Year 1 (2020)	Activities Year 2 (2021)	Future Considerations											
Governance and Leadership	<ul style="list-style-type: none"> File necessary (501(c)(3) and 1 Administrative Assistant) Form Governance Team Outreach to youth leadership at high school within the District and through Boulder College Student Association Invite CA and RA/PA members to participate in Governance Team and ECEP committees 	<ul style="list-style-type: none"> Hold quarterly meetings to discuss needed policy changes Youth, Parents, CA and other groups/committees form peer control responsibilities that will support and help inform emerging leaders 	<ul style="list-style-type: none"> Throughout this process, the leadership will stay in close and open communication to address whether CA and community leaderships feel they have greater influence in decision-making, do self-lead, and provide team building activities and workshops. 											
4. Support youth, parents, providers, leaders and/or Community Administrative Leadership roles where they can influence decisions	<ul style="list-style-type: none"> Invite CA, RA/PA, employees and youth to lead initiatives and knowledge share events Support CA to present and participate in panel discussions at these events for ECEP Inform and Encourage grants/contracts to access the most direct government officials regarding program design (e.g. ACT Now: Present CA to the Children's Behavioral Health Services) Involve identifying strategies for CA and resident leaders that go into grant proposals for funding Identify opportunities for CA and participants build that knowledge base 	<ul style="list-style-type: none"> Identify and recruit staff to create needed CA's and other leadership opportunities ECEP is lead facilitator and primary guide 												

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 thematic goals ● Goals, Objectives, action steps, and timelines for each department involved. ● 1-5-Year Operational/ or Implementation Plan <p>Appendix - Strategy Execution Plan-Meetings, measures, and formats for monitoring and communicating progress.</p>	
--	--	--

Phase 5: Final Draft	Components	
----------------------	------------	--

<p><i>An editable document is print-ready, can be modified by the company as needed, and can be 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 Client Dashboard (copy and enhance size)</p>
<p><i>Under the guidelines outlined 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>	<p>TBD</p>	 <p>The screenshot shows a 'Client Dashboard' with the following sections: <ul style="list-style-type: none"> How We Begin: A section with a blue header and a sub-header 'Project Plan'. Project Plan: A section with a blue header and a sub-header 'Minutes'. Minutes: A section with a red header and a sub-header 'How We Conclude'. How We Conclude: A section with a green header and a sub-header 'Additional Resources'. Additional Resources: A section with a yellow header and a sub-header 'Next Steps'. Next Steps: A section with a blue header and a sub-header 'FAQ'. FAQ: A section with a blue header. </p>

Format Options, Cost, and Requirements

One Day - \$3,500

5-Day revisions \$20,000 including 2 follow-up meetings, one debrief, and up to four draft revisions

*** An additional contract may be required. The cost depends on the extent and timeline of the additional Revisions. LJLA must receive the company's materials needed prior to the contracted date.**

6 Months - \$6,000/month (up to 30 hours)

2-Day Retreat - \$10,500, including debrief, completed plan, and 60-day check-in meeting.

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 mutually agrees with LJLS on a date, travel, and other items to be included as company expenses in 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.
- Avoid misunderstandings and confusion.



