



Outline for Strategic Planning Meeting

A. Mission and Vision (ensure clarity)

B. Key capabilities

- What do we do well?
- What else do you do?
- What don't you do well?
- If you had to make a decision what services would you keep?

C. Working Assumptions

- We have been in business for X years.
- We were created to do _____.
- If we don't provide X services, our consumers will not get X outcomes.
- We have good relationships with so and so providers.
- Others to be stated

D. Resource array

- Resources and spending is spread over XX programs
- The cost per person served is XX
- The revenues come from (sources)
- These revenues are vulnerable because.....
- My fundraised dollars are XX

E. The market place

- What are my colleagues experiencing?
- Are there merger, acquisition, and collaborations going on?
- Public policy is directly impacting on revenues by X
- My competitors are??
- General economic condition hurts or helps our clients

F. Learn how to collaborate and keep the mission alive

- Learning to work in shared space
- How to negotiate for a win-win

G. Scenarios

- Start with Exercise: if this happens, then this occurs and play it out.
- Tell me what story or headline you will write in X years
- Select a scenario

H. Risk

- Degree of risk and vulnerability of scenario.
- Are there capabilities to do this?
- What steps are necessary?

I. GO or NO GO DECISION (this become quite intense and intensive)

- If go, what decisions.
- If no go, what decisions.