

# ToP Streamlined Strategic Planning Process

Developed by Linda Hamilton

*Time: 6 – 8 hours*

Steps:

1. **Hold a Design Conference.** Exactly the same as in full strategic planning, but you will not (normally) include a SWOT, as that will be done by the entire group during the event.
2. **Begin the strategic planning event with a “Preparing for Planning” activity,** exactly as you would in a full strategic planning session.
3. **Practical Vision Workshop** – exactly the same as in full strategic planning.
4. **Current Reality:**
  - **Victory Circle** – Group brainstorms what they would like to celebrate one year from today. (Same as Action Planning)
  - **SWOT Analysis** – Facilitate a SWOT analysis on a prepared flip chart. Use different colors for each section.

Strengths (internal)	Opportunities (external)
Weaknesses (internal)	Threats (external)

- **Commitments** – What are they actually committed to achieving over the next 12 months? Write commitments on a flip chart. All must agree to them before they are written. Should NOT be a “laundry list” or “to-do list”. Should be no more than 8 – 12 commitments. Must be specific, measurable, action oriented, realistic and something that can be put on a timetable. As facilitator writes commitments on the flip chart, co-facilitator or assistant writes them on half sheets.
5. **Strategic Directions** – cluster commitments into 2 or 3 strategic directions. Facilitate naming of strategic directions, just as in full strategic planning.
  6. **Calendar** – Break group into teams with each team working on one strategic direction (allow folks to self-select, if possible). Have teams write the date each accomplishment should be completed. While teams are working, post calendar on sticky wall. Have teams post accomplishments on calendar as they finish. As achievements are placed on the calendar, the facilitator will post a large post-it note on each.

7. **Assignments** – Go over calendar, and make sure group is in agreement about when the achievement should be completed. Next, ask for volunteers to work on each achievement. Write names on post-it notes. Ask who will be the “lead” on each achievement, and put a star by that person’s name. Ask who will be the overall coordinator(s) of the plan. Write that name on a sticky note at the top of the calendar.
8. **Focused Implementation** - If time allows, have teams work on one commitment using a 90-Day Implementation Planning template (on a flip chart, or printed copies). If time does not allow, explain the importance of beginning their planning as soon as possible, and let them know you will include the template with their documentation.
9. **Closing ORID**