

STRATEGIC PLANNING WORKSHOP OVERVIEW

-a graphically facilitated workshop by: Rob and Laurie Benn, Co-Graphic Facilitators



Workshop duration: approx. 9 hrs (usually spread out over 2 days)
(order and activities will vary – to best meet Client needs)

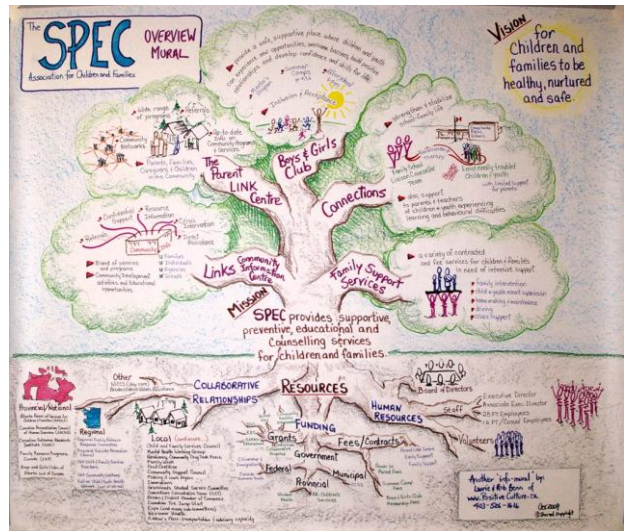
*Strategic Planning- guides the organization into the future – defines the 'bigger picture' and identifies strategic priorities/ actions towards achieving the Vision of the Organization as it moves forward in time. (Most groups we work with strategic plan for 3-5 years into the future).

The Day/Evening Before: (approx. 3 hrs)

OVERVIEW of ORGANIZATION: Respect

(order and activities will vary – to best meet Client needs)

- Overview Graphic** to help set the stage about the organization – (ie. Tree Graphic depicting highlights of the organization or perhaps a history mural of highlights of the work of the organization)
- Bring forward any recently completed **Stakeholder Input** for consideration (if applicable)
- Celebrate Successes** (if applicable) –often based on previous goals
- Review & Renew Vision, Values & Mission** – facilitated discussion to ensure everyone fully understands what each means – any questions?-further clarification?-need for any changes or tweaks?-do they still work for the Organization?
- Define Values, Vision, Mission together** – facilitated activities to help group come to consensus of shared values (*important for working together*), to articulate shared Vision elements the organization will work towards and to simply state the work the organization does, whom this work is targeting and the geographic area(s) served (the Mission).



The Next Day: (approx. 6 hrs – not including lunch and breaks)

WHAT'S AFFECTING US TODAY? Communication

(order and activities will vary – to best meet Client needs)

- Enviro Scan** – graphically facilitated group sharing of knowledge - bringing forward current trends and factors (political, economic, etc) surrounding the Organization today
- Current Hot Topics** (if applicable) – brief overview of current hot (or key) topics affecting the work of the Organization often drawn in a large graphic format
- COGS** – bringing forward the current challenges, opportunities, gaps and strengths associated with moving our Organization into the future – graphically recorded in a story-board format

WHAT DO WE WANT THE FUTURE TO LOOK LIKE? **Participation**

(order and activities will vary – to best meet Client needs)

Facilitated activity to come to consensus of ‘Success Factors’ as the Organization continues to move towards realizing its vision – what would we like our Organization to accomplish over the next 3 to 5 years?

DETERMINING OUR KEY (or strategic) AREAS for ACTION: **Creativity**

(order and activities will vary – to best meet Client needs)

- a) **Consensus of Key Areas for Action** – through a graphically facilitated conversation activity, participants come to consensus of strategic ‘big picture’ action areas over the next 3 to 5 years.
- b) **Determine Priorities; Identify Key Resources; Identify Danger Zones** (*identify key Challenges that could hamper or hinder the success of this strategic plan*)
- c) **Determine Board/Council actions** within each of the Key Areas for Action
 - a. Policy?
 - b. Advocacy?

NEXT STEPS, Wrap Up & EVALUATIONS

***Follow-Up within 10 days of workshop.** Our Client receives a custom CDROM containing: a copy of the visual summary report of the workshop; digital images of all charts generated; pics of folks working together through-out the day(s). It also includes assorted digital sizes of photos of charts for various applications after the workshop (i.e. web-site, documents, copying, sharing, reviewing, etc).

Client Testimonials:

“I highly recommend the planning workshop services of the Positive Culture Company to any CAO or Municipal Manager looking for a dynamic planning session that will bring Council or Board Members together to find consensus of Key Areas for Action over the next 3 to five years.

I have worked with the Positive Culture Company several times over the last ten years and it is my experience that, Laurie and Rob Benn, (Positive Culture Company), design and deliver rich and engaging planning sessions that facilitate interaction and discussion on important issues. I have found these sessions to be unlike any other planning sessions I have ever experienced.

The Positive Culture Company brought us to a plan with strong foundations. By the end of the session, there was solid buy-in for the plan and everyone was clear about where we were going.”

Leo Ludwig, Town Manager, Coaldale, AB

“When the Medicine Hat Catholic Board of Education requires facilitation services for a retreat or a strategic planning session our first call is to The Positive Culture Company and Laurie and Rob Benn. MHCBE has contracted the Positive Culture Company on a number of occasions and we have always been very happy with Laurie and Rob’s facilitation skills and their unique ‘visual Thinking’ approach to developing group awareness and consensus.”

David Leahy, Superintendent, MH Catholic Board of Education

“Great facilitation, very positive way of dealing with issues. Graphical representation of planning was EXCELLENT.”

Rob Miyashiro, Program Manager, Rehabilitation Society of Southwestern Alberta



The four parts of a positive culture.

