

| STRATEGIC PLANNING PHASE                             | DESCRIPTION  | FACILITATION TIPS   | RECOMMENDED TOOLS  |
|--|--|---|--|
| 1. What is our reality?                              | <ul style="list-style-type: none"> <li>A comprehensive assessment of the organization's current performance and landscape</li> </ul> | <ul style="list-style-type: none"> <li>One-on-one interviews</li> <li>Focus groups</li> <li>Staff meetings</li> <li>Community town halls</li> </ul>   | <ul style="list-style-type: none"> <li>SWOT Analysis</li> </ul>  |
| 2. What are we ultimately working towards?           | <ul style="list-style-type: none"> <li>Re-evaluate the organization's vision for long-term impact</li> </ul>                         | <ul style="list-style-type: none"> <li>Convene a committee to address visionary questions (e.g. "Why do we exist?" "What is the future we are creating?")</li> <li>Use creative visuals to inspire bold ideas</li> <li>Capture common themes</li> </ul>   | <ul style="list-style-type: none"> <li>Vision Statement</li> </ul>   |
| 3. What are the specific outcomes we aim to achieve? | <ul style="list-style-type: none"> <li>Identify core goals to be achieved over a five-year timeline</li> </ul>                       | <ul style="list-style-type: none"> <li>With the long-term vision in mind, reflect on goal-setting questions (e.g. "How do we need to grow and develop in order to get closer to our vision?")</li> <li>Define our core areas of impact (e.g. students, parents, teachers) and desired outcomes</li> </ul> | <ul style="list-style-type: none"> <li>Spheres of Influence</li> <li>Core Goals</li> <li>Theory of Change</li> </ul> |

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| 4. What is standing in our way?                           | <ul style="list-style-type: none"> <li>Identify key challenges to be addressed in order to realize core goals</li> </ul>                                   | <ul style="list-style-type: none"> <li>Discuss and prioritize the primary challenges that will continue to inhibit growth if not addressed (i.e. "What's stopping us from achieving this goal tomorrow?")</li> </ul>   | <ul style="list-style-type: none"> <li>Critical Hurdles</li> <li>Eisenhower Matrix</li> </ul>  |
| 5. What actions do we need to take in order to get there? | <ul style="list-style-type: none"> <li>Generate the content of strategic plan implementation - the key strategies and tactics in each goal area</li> </ul> | <ul style="list-style-type: none"> <li>Identify the primary objectives to be achieved (strategies) in order to achieve goals</li> <li>Evaluate how to best leverage resources in order to execute strategies (tactics)</li> <li>Project implementation timeline (years 1-5), and leadership needed</li> <li>Finally, reflect on what the defined strategies indicate overall approach (mission)</li> </ul> | <ul style="list-style-type: none"> <li>Implementation Plan (strategies, tactics, leadership, and timeline)</li> <li>Mission Statement</li> </ul> |
| 6. How will we measure our progress?                      | <ul style="list-style-type: none"> <li>Identify the key benchmarks and metrics to track progress annually towards set goals</li> </ul>                     | <ul style="list-style-type: none"> <li>Analyze existing metrics</li> <li>Determine annual key performance indicators for each goal area</li> <li>Establish key metrics and data collection methods</li> </ul>  | <ul style="list-style-type: none"> <li>Key Metrics Tracker</li> </ul>  |