



Strategic Planning Overview

Your Facilitators

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Strategic Plan Components

Where are we now?

External and internal assessment that includes:

External stakeholders, for example:

- Consumer groups,
- Licensees, and
- Others who affect or are affected by OMBC

Internal stakeholders, for example:

- Staff and the management team,
 - Boards, bureaus, committee, commission, etc.
 - Mission
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Where do we want to be?

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- Goals that clearly define each major function of the program
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- Objectives that outline what is to be done and the benefit
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- Vision

How do we get there?

- Sufficient time for the management team to discuss the external and internal assessment and develop objectives
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- Resource assumptions
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- Action plans that indicate individual tasks needed to complete the objective, who is responsible for completing the task, and a date the task (or objective) will be completed
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- Ownership of deliverables

How do we measure our progress?

- Performance measures, objectives indicate how success will be measured
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- Monitoring and tracking by the management team with regular check-ins



Strategic Planning Roadmap

1 week

8 weeks

2 weeks

5 weeks

2 weeks

Initial Meeting & Set-up

Environmental Scan

Planning Session

Create & Finalize Plan

Action Planning

- Initial meeting with OMBC Executive Officer
- Introduce facilitators
- Set schedule and determine dates
- Define process and roles
- Create customized development plan for OMBC
- Revisit goals, mission, vision, and values

- Survey external stakeholders
- Survey OMBC staff
- Conduct OMBC board member interviews
- Compile, analyze, and summarize data to create the Environmental Scan
- Review findings with OMBC
- Participants receive Environmental Scan and worksheets prior to Planning Session

- Create Facilitation Plan in advance of Planning Session
- Conduct Planning Session
- Review Accomplishments (if desired)
- Review Environmental Scan results
- Revise mission, vision, values (if desired)
- Establish objectives

- SOLID drafts plan
- Review plan with OMBC Executive Officer and make adjustments, if necessary
- Board approval/ adoption
- Client provides plan to PDE for graphic design
- Client publishes plan to website

- Prioritize Objectives
- Establish timeframes
- Determine metrics
- Assign responsibilities
- Draft action plan
- Review plan with OMBC Executive Officer and make adjustments



Questions?