Sample Agenda – 2.5 hours
Planning Framework Exercise

1. Welcome 5 minutes

2. Each team members shares accomplishments they see from last 12 months 15 minutes

3. Each team members share lessons learned over last 12 months: 15 minutes

4. Strengths: What are you all good at as team? Top strengths? 15 minutes

5. Areas in need of Improvement: 15 minutes

5. Opportunities: 20 minutes

What are your greatest opportunities now to create more value and impact in the community? How can you build the org's capacity to do this? Do you have opportunities to solve difficult problems? If you can get first-hand information from or data from community partners, vendors, investors, donors, programs that might support this, that is great!

6. Threats: Trends that threaten success both internally and externally. 15 minutes

7. Strategic Game Changers: 20 minutes

If you could achieve these, you would be propelled to the next level, things would really change and become measurably better.

8. Parking Lot: Anything that comes up that does not easily fit in the first seven areas.

Break: 7 minutes

9. Voting! 10 minutes

Each person votes for 3 areas across the entire framework that stand out as strategic priorities for the team or organization (depending on your focus). In zoom, put stars next to these items or bold them in color in the Google drive. In person mark stars on paper or use small sticky pads.

10. Count votes, review and establish top 3 priorities. 15 minutes

If you have a tie, re-vote on just those areas that have ties.

Establish 3 strategic priorities for the quarter. See Guidance document for next steps.

11. Closing Round: Each person shares what went well today and what could be improved for next time.