

Member Agency Strategic Transition Series

Session #16: Transitional Strategies & Application

Thursday, October 10th, 2019 - 9:00 am to 2:00 pm (Lunch provided)

Overview:

Transitional strategies and application processes move an agency toward its intended vision. This workshop, the second of Stage #4: Envisioning & Operationalizing a Transition Plan, focuses on shifting from the strategic visioning process to transitional strategic priorities, organizational goals, objectives and finally strategies / game-changing actions needed for advancement. The session includes collective learning, along with dialogue, application and reflection to enrich the strategic transitional planning process. Objectives of the workshop are to:

- Better understand the roadmap from strategic visioning to transition planning and implementation.
- Advance learning on how to determine your agency's key transition strategic priorities.
- Gain insight on framing organizational goals, objectives and strategies that support transitional priorities.
- Improve knowledge on how to build game-changing action plans that lead to operational transformation.

Workshop Agenda

Time	Activity
9:00 am	Welcome & brief Series Overview- Julie Simon, Helping Agencies Build Capacity, United Way <ul style="list-style-type: none">■ Commences session; reminds about Series intent, framework & microphone usage*■ Describes purpose of today's session■ Introduces presenter
9:10 am	Presentation & interaction on Transitional Strategies & Application – Rebecca Bennett <ul style="list-style-type: none">■ Participants can take notes on hard copy PP presentation included in packets■ Agencies develop/review key transition strategic priorities Break – 10 minutes (11:00 am) Presentation continues, plus individual and group interaction: <ul style="list-style-type: none">■ Agencies develop/review operational transformation matrix
12:00 Noon	Lunch Reminder: if leaving early, please complete and submit your survey
12:20 pm	Continued presentation and individual/group interactions: <ul style="list-style-type: none">■ Agencies devise/review goals & objectives and develop/review aligning strategies
1:50 pm	Conclusion - Julie Simon <ul style="list-style-type: none">■ Participants highlight major take-aways from the session■ Reminder: submit completed survey & note final session date (11/6/19, 9am – 2pm)
2:00 pm	Adjourn

*UW requests Series participants use microphones so that all can partake in the learning experience.