Member Agency Strategic Transition Series

Session #17: Implementing Your Transition Plan

Wednesday, November 6th, 2019 - 9:00 am to 3:00 pm (Lunch provided)

Overview:
The Transition Series aims to better position member agencies for adapting to the shifting funding environment, with final sessions helping agencies integrate insights and learnings from previous sessions to establish a path forward. This last session will address goals, objectives and strategies for an actionable roadmap, then focus on implementation and sustaining forward momentum and conclude with agencies reflecting & sharing insights about Series & added support needed to better adapt to changing landscape. Workshop objectives:

- Better understand the roadmap and resources needed to effectively implement transition plans.
- Advance learning about monitoring plan success through metrics and scorecards.
- Gain insight on identifying gaps in progress and methods for closing gaps, correcting or recalibrating.
- Identify ways to sustain forward momentum.

Workshop Agenda

Time	Activity
9:00 am	Welcome & brief Series Overview- Julie Simon, Helping Agencies Build Capacity, United Way ■ Commences session; reminds about Series intent, framework & microphone usage* ■ Describes purpose of today's session ■ Introduces presenter
9:10 am	Presentation & interaction on Implementing Your Transition Plan – Rebeccah Bennett ■ Participants can take notes on hard copy PP presentation included in packets ■ Includes devising goals & objectives and developing aligning strategies **Break – 10 minutes** (11:00 am) Presentation continues, plus individual and group interaction: ■ Agencies prepare for transition plan implementation, including action plan exercise
12:00 Noon	**Lunch** Reminder: if leaving early, please complete and submit your survey
12:20 pm	Continued presentation and individual/group interactions: ■ Includes monitoring success, by developing measures, tracking progress through scorecards and sustaining momentum toward achieving vision, goals & objectives
2:45 pm	Conclusion - Julie Simon ■ Participants reflect on & share highlights of Series, learning & how they are applying learning to develop transition plans for mapping adaptation to future landscape, plus added resources they may need to facilitate continued planning and implementation ■ Reminder: please complete & submit survey related to this session and the Series
3:00 pm	**Adjourn**

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