

Session #17 Overview – Implementing Your Transition Plan

November 6, 2019 | 9:00 am – 3:00 pm | Rebecca Bennett

IMPLEMENTING YOUR TRANSITION PLAN

Final Series sessions have been helping agencies build a roadmap to the future -- integrating insight and learning from prior sessions into a desired future (vision), priorities, goals, transition strategies and action plans. This last session will: 1) briefly review drivers of success (priorities) and transformation matrix, before addressing goals, objectives and strategies that make up an actionable roadmap; 2) focus on implementation and moving toward your intended vision, using good indicators (along with scorecards) to evaluate actions taken, progress and success; and 3) conclude with additional support needed by agencies to move toward their intended visions.

Special Instructions: Review and bring your completed Session #15 and #16 worksheets (available on our website).

Target Audience: Board members and executive directors.

Learning Objectives for Participants:

- Better understand resources needed for plan implementation.
- Advance learning on determining & utilizing metrics that matter for gauging, evaluating & measuring progress.
- Gain insight on tracking progress, maintaining accountability & staying the course to meet goals & objectives.
- Improve knowledge on using scorecards to keep stakeholders apprised of movement toward intended vision.

Key Concepts:

- Strategic Priority Analysis and Operational Transformation Matrix
- Goal Setting & Objective Development
- Strategy & Action Plan Development and Considerations (Impact & Effort Matrix)
- Success Measure Development and Tracking Scorecards

Group Exercises: Strategic priority analysis and developing goals, objectives, strategy, action plan & success measures.

Racial Equity Lens Application: Understanding and engaging community from a racial equity perspective strengthens the overall planning process.

Major Take-Aways by Participants: 1) Transition plan – better understand logical steps, reason to develop plan & move org forward; critical thinking and future planning; ensure living, breathing plan; roadmap with tried methods for operational efficiencies; 2) Components/flow: need limited # of clearly defined, focused (mapping) priorities, goals, obj & strategies; effort vs impact matrix; go from strategy to measurable actions; specific doable plan, minimum 3-month timeframe; create/use concrete actions to actualize vision using goals, obj, strategies; and 3) Track & monitor: look at baseline data; identify meaningful realistic success/progress measures; regularly review, assess & re-evaluate.

Key Concepts in Common with Other Sessions: All previous Sessions

To Learn More:

Strategic Visioning for Community Development:

<http://stillwater.msuextension.org/fcsmontguides/StrategicVisioningforCommunityDevelopment.pdf>

Seven Challenges of Change - Gisela Wendling: <https://giselawendling.com/seven-challenges-of-change/>

About the Presenter:

Rebecca Bennett is Founder and Principal of Emerging Wisdom LLC – a forward thinking social enterprise that helps individuals live empowered lives, leaders build impactful organizations, and communities advance brighter futures. At Emerging Wisdom, Rebecca and her team design and facilitate personal and professional growth programs, organizational improvement efforts, and social transformation initiatives, customizing each offering to deliver lasting breakthroughs and exceptional results.