



United Way
of Greater St. Louis

MEMBER AGENCY STRATEGIC TRANSITION PLANNING SERIES

Session #1 Overview – Series Overview & SWOT Analysis

May 17, 2018 | 9 am to 1:30 pm | Julie Simon & Rebecca Bennett

SERIES OVERVIEW AND BEGINNING SELF-ASSESSMENT

This is the first of our 13-session capacity building Series, tailored to help better position member agencies for adapting to a shifting funding environment, including our new funding model. This initial session is comprised of two parts – [Part 1](#) lays the groundwork for the Series, with overview and learning framework, setting course overall and outlining pathway to enhance learning, which when applied, contributes toward achieving Series objectives; and [Part 2](#) dives into the Assessing Current Position stage, clarifying reasons for assessing the present state, highlighting an analysis framework for initial self-assessment, and improving understanding of an agency's current condition.

Special Instructions: For Part 2, bring agency's most recent SWOT analysis (Strengths, Weaknesses, Opportunity and Threats, typically part of initial phase of strategic planning process), if available.

Target Audience: Board members, executive directors & senior leaders involved in overarching agency-level decision-making.

Learning Objectives:

- Participants will increase understanding about the Series, including ways the progressive multi-session structure enhances meeting agencies where they are and helps them move the needle forward
- Participants improve comprehension about how the Series participation helps to build skills, strategies and resources toward developing a strategic agency-specific plan for adapting/transitioning to funding model shifts
- Attendees will advance learning about environmental scans, whose findings build/strengthen a shared understanding of an agency's state that will contribute to informing future vision
- Participants will gain insight, through internal/external assessment, about agency's key capabilities & vulnerabilities

Key Concepts:

- Curriculum design in alignment with session content, learning framework and overarching objectives
- Building block model – progressive session structure
- SMART goals – measurable impacts; continuous quality improvement
- SWOT analysis – internal and external environmental scan considerations

Concept Application/Small Group Exercises:

Presentation will include hypothetical streamlined SWOT analysis to help participants apply concepts introduced; exercise will focus on agencies performing and/or updating their own SWOT analyses, including conducting environmental scans, to bring outside voices to the process.

Racial Equity Lens Application:

SWOT analyses should be developed not only by organizational stakeholders who have positional authority and are accountable for institutional outcomes, but also by those who are impacted by agency decision-making and programmatic investments. The latter group is often NOT included in planning efforts and has critical insights about the agency's weaknesses and pain points, as well as its under-noticed and leveraged strengths.

Key Concepts Related to Other Sessions:

Concepts foundational and key to all sessions, particularly Session #8: Vision & Strategic Direction, #11/12: Strategic Alliances and #13: Operationalizing Plan>

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.