

# Session #16 Overview – Transition Strategies & Application

October 10, 2019 | 9:00 am – 2:00 pm | Rebecca Bennett

## TRANSITION STRATEGIES & APPLICATION

The final three sessions of the Transition Planning Series help 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 Session will briefly recap Session #15's strategic visioning process before focusing on transitional strategic priorities, organizational goals, objectives and finally strategies / game-changing actions needed to move an agency toward its intended vision. The session will include collective learning, along with dialogue, application and reflection to enrich the strategic transition planning process.

**Special Instructions:** Review Session #15's power point presentation (available on our website), complete exercises and bring materials to this Session.

**Target Audience:** Board members and executive directors.

### Learning Objectives for Participants:

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

### Key Concepts:

- Vision of Success Statement - desired impact, drivers of impact & needed operational shifts
- Strategic Priority Analysis
- Operational Transformation Matrix
- Impact & Effort Matrix

**Group Exercises:** Key transition strategic priorities analysis and operational transformation matrix exercises.

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

**Major Take-Aways by Participants:** 1) Map flow of strategic and focused overall planning process; 2) Analyze, streamline and frame priorities, determining what to preserve and eliminate; 3) Establish concrete priorities, objectives & strategies, using impacts & efforts matrix and planning math info; 4) Relationship between SWOT analysis and strategic visioning process; importance of future landscaping as part of process; and 5) Crowd-sourcing (getting more voices involved in) the work for maximum input & buy-in.

**Key Concepts in Common with Other Sessions:** All previous Sessions

### To Learn More:

Strategic Visioning in Four Steps (Example):

[https://www.aesa.us/conferences/2016\\_ac\\_presentations/Strategic\\_Visioning.pdf](https://www.aesa.us/conferences/2016_ac_presentations/Strategic_Visioning.pdf)

Impact Effort Matrix Reference Guide:

[https://www.denvergov.org/content/dam/denvergov/Portals/728/documents/Peak\\_Performance/Black\\_Belt/Reference\\_Guides/Guide\\_Impact\\_Effort\\_Matrix.pdf](https://www.denvergov.org/content/dam/denvergov/Portals/728/documents/Peak_Performance/Black_Belt/Reference_Guides/Guide_Impact_Effort_Matrix.pdf)

### 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.