

United Way Nonprofit Training Series:

Module Five: Strengthening Your Strategic Planning Process Core Competency Self-Assessment & Growth Opportunities



Description: Today's workshop outlines a strategic planning process, which includes for building and applying competency skills (where self-assessment indicates greatest agency shortfall/growth opportunity) to strengthen performance and increase application readiness. The presenter will map the process flow, ensuring the living plan clearly states agency vision, SWOT, priorities, goals & objectives, strategies & actions, with indicators to evaluate effectiveness & report progress.

Learning Objectives for Participants:

- Increase understanding about the components of an effective strategic planning process.
- Gain insight about selecting key priorities on which to focus efforts.
- Advance learning about process, tools & resources to facilitate strategic plan development and implementation.

Core Competencies: □ Effective process facilitates strategic planning; □ Strategic plan addresses key priorities; □ Responsible parties accountable for achieving directives; □ Periodically updated strategic plan keeps focus relevant.

Self-Assessment & Growth Opportunities

Directions: Use the chart to rate your agency on its skills possessed (S) and its application (A) of Core Competencies addressed in this Session. Ratings range from 1 to 10, with 1 equating to No Skills and Application and 10 - Highly Effective Skills and Application. Then, based on these ratings, identify growth opportunities you/your agency may want to pursue. **Note:** The assessment is solely for your use, to help: (1) consider your agency's readiness to complete a qualified application; and (2) identify potential areas of growth you/your agency may explore.

Skills & Application												
Agency Core Competency	(S/A) Scale:	1	2	3	4	5	6	7	8	9	10	Growth Opportunity & Strategy
<i>Ex: Proper Board structure in place.</i>		A		S								<i>Putting skills into practice; educate Board on structural benefits</i>
Effective process, tools & resources used to facilitate strategic plan development.												
Agency utilizes its strategic plan to address key overarching priorities.												
Systematic process holds parties accountable for achieving priority directives.												
Strategic plan updated periodically to ensure agency continues to focus efforts on relevant priorities.												

Notes: _____
