



Session 5: Putting it to Practice

Peer to Peer Support in Sustainability and Strategic Planning

OVC HTC's Sustainability and Strategic Planning Training Series – Spring 2023

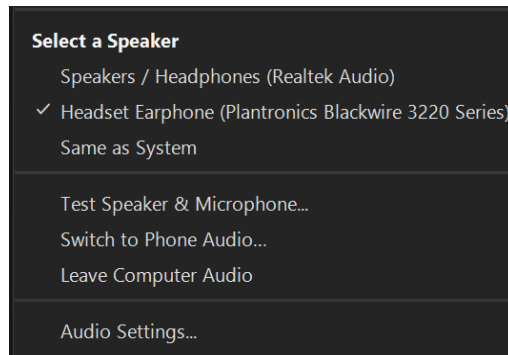
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Here are some helpful tips for using Zoom during today's session:

Audio Connection:

Select the arrow next to the audio button to access audio features and select your speakers and microphone.



Chat:

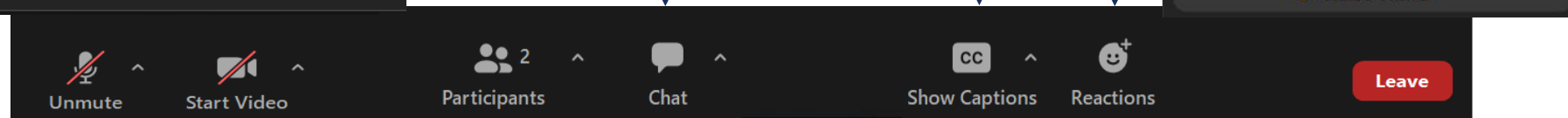
The default setting is to message everyone. Please note that if you want to send a message to one of the hosts privately, use the drop-down and select their name from the list of options.

Closed Captioning:

Please click the **Show Captions** button to view closed captioning.

Reactions:

Click **Reactions** to see/select the 'Raise Hand' function or share a reaction with the group.



Technology and Accessibility Reminders

- The material presented during the 2023 Sustainability and Strategic Planning Training Series will be recorded and shared with attendees via email in the following days.
- OVC HTC is committed to providing universal access to all of our events. To request accessibility accommodations (e.g., sign language interpreters, large print), please contact HTCollective@icf.com or call 502-259-0459 to discuss with an HTC team member. Advance notice is necessary to arrange for some accessibility needs.
- As with all technology, we may experience a momentary lapse in the breakout session. If you experience any issues re-accessing the platform or with the audio during this session, please email our technical specialist, Jameel Evans, at jameel.evans@icf.com for assistance.

Evaluation

- At the conclusion of each session, participants will be prompted to complete a short evaluation survey for that session. Please select 'continue' to be taken directly to the evaluation.
- Participants will be receiving a certificate of completion and asked to complete a more in-depth survey focusing on the training series as a whole.
- We sincerely appreciate your feedback!

Presenters

Morgan Rumble-Whiting



Elizabeth Scaife



Learning Objectives

Facilitate the application of learning by guiding participants through the development of a concrete strategic plan.

Host a peer review with supportive feedback as participants present their goals, objectives, action steps, and outcomes.

Provide considerations for next steps as organizations move forward in designing and implementing their own 3-5 year plans.

RECAP: What We Learned So Far

Strategic Planning framework:

1. Theory of Change – mapping your outcomes pathway to identify your most pressing GOALS
2. Goal setting for the next three years with desired outcomes/outputs
3. Objectives to support your goals
 - a. Actions that accomplish objectives
 - i. Action steps with staff assignments
4. Feasible timeline – considering capacity, resources, timing
5. SWOT – a tool for building strategy

Session 5 Assignments

SWOT Analysis

- Assess your agency's strengths, weaknesses, opportunities, threats.
- Consider and list your needs for conducting a sustainability and strategic plan.

Strategic Plan (1-3 years)

- Outline goals
- Draft objectives
- Define outcomes/outputs
- List action steps with timeline
- List resources required
- Identify risks/threats and how your strategy addresses them

Mock Scenarios!

You will receive:

- Organization identity
- Clearly stated vision

You will determine:

- Organization name
- Mission
- Core values
- Objectives
- Outcomes/Outputs
- Basic action steps



Group Assignments

Group #1 Vision:

You envision a world where all kittens have safe homes, free from abuse or euthanasia, and all kitten lovers can easily find and adopt their favorite fur-baby.

Group #2 Vision:

A state supported by tourism with the world's largest one-of-a-kind ice cream Adventureland that celebrates diversity and inclusion.



Breakout Rooms

1. Assign a note-taker/reporter
2. Build a basic 3-year strategic plan based on the assigned organization and stated vision – to include your mission, core values, objectives, outcomes/outputs, and basic action steps.
3. Identify beneficiaries and resources needed to support the plan.
4. This is meant to be fun, interactive, and discussion based!

Report Back



Breakout Rooms: PEER TO PEER SHARING & LEARNING

Assign a note-taker/reporter

Room 1: SWOT Analysis

- *Is the analysis fair and comprehensive?*
- *Did it reveal key priorities that the presenter will address in their plan?*
- *What potential blind spots are identified by the presenter or peers?*
- *Does it account for DEIA goals/measures?*

Room 2: Strategic Plan

- *Is the mission clear? Are the objectives and outcomes realistic for the capacity of this agency/team?*
- *Is the strategy comprehensive? What potential blind spots are identified by the presenter or peers?*
- *Does it account for DEIA goals/measures?*
- *Is the timeline feasible? What's missing?*
- *What strengths were identified in the agency's plan? What potential weaknesses exist?*

Report Back



Training Takeaways

Sustainability

- Impacted by multiple domains of equal importance
- Healthy organizational culture and a growth mindset are the foundation for impact
- Strategy development is required
- DEIA factors are essential to growth

Strategic Planning

- Framework for creating a clear plan based on a vision, mission, values, and long-term outcomes.
- Roadmap for goals, objectives, actions, and performance measures
- Setting priorities and SWOT analysis
- Applied knowledge for peer-to-peer learning



Next Steps

Connect with HTC and your Navigator

- Office Hours
- Communities of Practice calls
- OVC HTC Diversity, Equity, Inclusion, and Accessibility (DEIA) Virtual Training Series: June 7th and June 21st
- TA support

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