

# How to Grow!

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How to Create a Strategic Planning Session

# Today's Agenda

Learn how to develop a strategic plan to ensure your agency's success

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- Why You Are Doing This
- When and Where to Hold Your Session
- Who Should Attend
- What You Will Need to Prepare and Bring



# So Why Are You Doing This?

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- Are you serving more people than originally planned?
- Are you receiving more food than you have space?
- Do you have the capability to serve more people?
- Are you turning away clients because of lack of:
  - Space?
  - Food?
  - Funds?
- Does your board know the challenges?
- What are the plans for the future?





# When, Where, Who, and What You Need

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- What is your financial calendar year? January 1<sup>st</sup> to December 31<sup>st</sup>?  
If so, you should hold the meeting early October
- Do you have a secure quiet location that can accommodate all of your board members as well as key personnel?  
You will need your board, someone to take notes  
The person responsible for the budget - e.g. treasurer, CPA, bookkeeper
- An outside facilitator that has knowledge of your organization – e.g. volunteer with high level business experience. This can be a paid or non-paid position. There are also professional, paid facilitators

# What You Need

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- An agenda with a timeline
  - A projected budget for the next year
  - Note pads and pens
  - Large pad with easel to jot down ideas and also parking lot ideas (for the future)
- Agenda to include:
    - Introductions and ice breaker
    - Review the mission statement of the organization
    - Year to Date budget
    - Projected budget
    - Number of clients served in previous years and year to date
    - The Wish List!!



# How to Go!!

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How to Plan For Your Replacement

# Agenda

Planning for when it is time to leave to ensure your agencies sustainability for years to follow.

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- Why should you have a succession plan?
- What do you need for the plan?
- Is there a manual of policies and procedures for each department?
- When do you notify the board of your plans?
- \*\*\*\* Important\*\*\*\*Pick a date and stick to it



Do you feel like this cat every week?

Do you have volunteers cross trained for the main positions?

Is there someone that can replace you and all you do?

If not....who will take over for you when you leave?

What would happen to your organization if you suddenly were not there?



# What Do You Need For the Plan

## The Manuals

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### Procedure Manual

- How to complete each task by departments
- All website links, usernames and passwords
- All organization information e.g., 501C3, tax exempt, insurance policies

### Policy Manual

- By laws
- Non-discrimination
- Sexual Harassment
- Employee manual
- Workers Comp information



## When To Let Them Know “It’s Time To Go”

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Give plenty of notice – remember you put your heart into the organization and you want to see it succeed

Select a date and stick to it!

Tell your board FIRST!!! Don’t let them find out second hand.

Make sure you have enough time to train your replacement. You have a lot of information stored in the file box on your shoulders!



# Saying Goodbye

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How lucky I am to have something  
that makes  
saying goodbye so hard!



Any Questions?  
Email me at [irene.lakecares@gmail.com](mailto:irene.lakecares@gmail.com)

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