

## **Artistic Logistics Planning Process Outline**

### **Organizational Assessment & Pre-Planning**

A thorough investigation of the organization's current condition, through telephone interviews and on-site meetings; and the planning session for the strategic planning process.

Document review

Understanding the organization through its budget, by-laws, promotional and grant material

Interviews & discussions

Telephone interviews with leaders and key stakeholders

One day on-site assessment meeting, planning for community input

S.W.O.T. analysis

Mapping the organization's Strengths, Weaknesses, Opportunities and Threats

Identifying external factors

Organizational assessment report

Crafting a report that documents where the organization is at this moment in time, what its major challenges are, where opportunities exist

### **Community Input Sessions**

On-site meetings to gather community input and priorities

Facilitated meetings using the "Technologies of Participation"

Compiled notes and report for distribution to planning committee

### **Planning Retreat**

A two-day session to define the "skeleton" of the strategic plan

Vision 2025

A brainstorming session identifying where the participants want the organization to be in 20 years

Practical Vision

A facilitated workshop identifying what participants want to see in place in 3 to 5 years

Obstacles

A facilitated workshop identifying the inherent contradictions preventing the organization from achieving its vision

Strategic Directions

A facilitated workshop identifying the catalytic actions that will address the obstacles and move the organization toward its practical vision

Action team formation

Creating teams to refine action steps, strategies and objectives for each of the Strategic Directions; planning templates provided

### **Action Planning**

Action teams

Independent meetings to map out details of plan

Conference calls

Regular check-ins with the consultant and action team leaders to clarify questions about the planning process

## **Plan Synthesis**

Plan assembly

Synthesizing action team documents into a coherent whole

Synthesis meetings

Two-day on-site visit for planning meetings with key participants to determine areas of contradiction and confluence, and to clarify priorities.

## **Plan Creation**

Writing

Detailing the planning process, creating context statements for each of the Strategic Directions, creating a "Planning Log" to track progress, creating an executive summary.

Budgeting

Working with Executive Director to create budget forecasts linked to plan.

Revision

Working with action team leaders to revise and refine the language of the plan

Presentation

One-day on site meeting with all participants to present the plan, celebrate its completion and outline next steps (including when to evaluate plan progress)

## **Deliverables:**

- Assessment report
- Community planning report
- Comprehensive Strategic Planning Document
- Planning Log
- Notes from all phases of plan
- On-site meetings for Planning Retreat, Synthesis and Presentation