

# Retreat Homework Assignment

In preparation for the July 10th TRPC retreat, there is some homework we are asking our members to do prior to the retreat. Because our time is limited on that day, getting our members thinking and preparing will save time and provide a richer discussion and result.

Please take a look at and undertake the three (3) activities outlined below:

1) Set aside the July 10th TRPC retreat meeting date and time. We will start promptly at 8:30 am after a 30 minute breakfast snack and peer exchange. We are planning to be finished promptly at 3:30 pm. We have worked very hard to compress the agenda so please plan on spending the entire time with us.

2) Prepare top three strategic interests and/or concerns of the agency you represent on TRPC. These should be big picture, high level strategies or issues facing your organization in the foreseeable future. Please come prepared to discuss these issues in a small group setting, with the expectation of reporting out to the full group.

3) Review attached material: "Strategic Themes, Goals, Objectives, Activities/Tasks: Working Definitions". This will enable common and shared understanding of the work we have ahead of us that day.

Thank you for your effort. We look forward to a successful and productive day of work.  
See you on July 10<sup>th</sup>.



## Strategic Themes, Goals, Objectives, Activities/Task Working Definitions

Strategic planning is an organizational initiative designed to help focus the enterprise and strengthen its performance overtime. This planning is usually based from the organization's mission (purpose) and vision. By shaping high-level strategic themes and goals, then translating them into more defined objectives and tasks, staff understand their role and related accountabilities in support of the plan.

### Themes and Goals

Themes and goals are broad and high-level descriptions of what you're trying to accomplish. They help set your fundamental, long-range direction. If a strategic theme is viewing the work of the organization at a 10,000' level, the goal is more defined, at the 5000' view.

**Theme Example:** *Build Our Communities Knowledge and Understanding of the Asset Building Coalition and Its Value*

**Goal Example:** *Develop and Implement a 1-2 Year Marketing Plan with Priorities and Timeline*

### Objectives

Objectives break your goals down into the specific outcomes you need to achieve – or the big steps you need to complete – to reach your goal. They define who, at a high level, is going to do what by when, to accomplish a specific, measurable outcome. They are milestones along the road you travel to get from where you are now to reach your journey's goal.

#### Some examples of objectives

**Process objectives** - focused on activities. They are commonly described as the specific number and types of activities to be completed by a specific date.

**Example:** *By April 1, 2011, develop and test key messages with at least 10 primary stakeholders.*

**Impact and outcome objectives** - focused on changes in attitudes, knowledge or behavior. They commonly are described in terms of the degree of change you expect to create.

**Example:** *By June 2010, assess the level of ABC operating knowledge by key line staff working in member organizations.*

**Example:** *By Sept. 2010, assess number of inter-agency referrals that have occurred among member organizations during the last 6 months.*

## Activities/Tasks

These are the “medium-sized” and/or small steps you take to achieve your objectives on the way to reaching your goals. They can be very “granular” and include specific information about *who is individually responsible to get what done by what date.*

*Examples:*

Task	Owner	Start	Finish
Plan and deploy cross organizational orientation sessions for member line staff.	Julie	6/30/2010	7/30/2010
Plan a strategy to assess line staff understanding of Coalition goals, member services, and referral practices.	Sue	9/15/2010	10/15/2010

## “SMART Objectives”

**S**pecific – *What exactly are we going to do, who are we doing it with and/or who are we doing it for? Usually stated in numbers, percentages, frequency, reach, scientific outcome, community impact, etc.*

**M**easurable – *Is it measurable and can we measure it? Can we gather or access the data we need to measure the impact of our work?*

**A**chievable – *Can we realistically accomplish the objective in the proposed timeframe/in this political climate/with current resources, with existing technology, etc.?*

**R**elevant – *Will accomplishing the objective help us make progress toward achieving our goals and realizing our vision? Is the link between the objective and our goals clear, strong and direct?*

**T**imebound – *On what specific date will you accomplish this objective?*