

## Facilitated Organizational Self-Assessment Sample Agenda for 2-Part Meeting

### Day 1

#### 9:00 - Welcome and Introductions

#### 9:15 - Review Agenda and Desired Outcomes for Meeting

- What do you hope we achieve today and through this planning process?

#### 9:30 - Brief Overview of the Organization and Its Mission

#### 10:00 - Vision for the Future – In Two Years:

- Will be...
- Will do ...
- How much would you want to grow? In what way?
- Do you have the organization and human resources necessary to accomplish it?
- What else / more is needed?

#### 11:00 How is the Board & Work Organized?

#### 11:45 Confirm Date and Plans for Day 2 Meeting

- Deeper assessment of your organization
- Confirm priorities to address in the plan
- Develop Action Plan

✓ Homework - Consider what key questions you want to answer in your capacity improvement plan.

#### 12:00 Adjourn

### Day 2

#### 2:00 - Brief Summary of the First Meeting

#### 2:15 - Organizational Assessment

- What internal strengths and challenges should you consider as you plan for the future?
- What external factors may impact your future?
- What will the organization need to fulfill its mission?
- What will you need on the board/leadership team?

#### 3:00 - Planning Priorities

- What are your key questions?
- What are the key issues impacting the organization?
- What should be the focus/priorities of the capacity improvement plan?

#### 3:30 - Action Plan

- Identify one or two goals for each priority area
- Develop an action plan for next two years (tasks, resources needed, who will lead, timeframe) for each goal.

#### 4:30 - Agree on the Plan

- Review all goals and action plans
- Agree on what tasks will be incorporated into the plan.
- Summary and conclusions

#### 5:00 - Adjourn