



MEETINGS THAT MATTER

Coaching, Facilitation & Support for Effective Teams

DRAFT Workshop Outline

- I. **Intros & Agenda Review**
- II. **About Me**
- III. **About You**—Connect the workshop and your broader work to members' personal values and goals. *What is success to this group?*
- IV. **Types of Process & Things to Consider:**
 - Collaborative Philosophy - your top priorities considering:
 - ✓ Cost
 - ✓ Politics
 - ✓ Commitment
 - ✓ Time
 - ✓ Logistics
 - ✓ Values
 - Core Issues to be Addressed
- V. **Overview of Strategic Planning Components—**
 - Project Planning
 - Creating your Teams
 - Internal Assessment
 - External Assessment & Community Engagement
 - Finalizing Your Strategic Plan (options and examples)
- VI. **Deep Dive: External Assessment / Community Engagement Elements—**
How to design differently
 - How to develop your project management & other teams
 - Establishing the scope of your outreach
 - ✓ Building and strengthening your relationships with community partners, volunteers, supporters & the public
 - ✓ Designing a community survey (template provided)
 - ✓ Implementing community meetings, training staff and volunteers to help
 - ✓ Data: How to collect data throughout the process; compiling & interpreting the data collected: using the data to create a clear vision and goals (template provided)
 - Communicating back to the public
- VII. **Project Planning Options—** options (and cost estimates) for Meetings That Matter (consultant) engagement, with optional board, staff, and volunteer management & leadership
- VIII. **Closing**

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How to Design and Implement a Successful Community Engagement Component For Your Strategic Planning Process

WORKSHOP PROPOSAL

Workshop Objectives:*

- Help the Santa Cruz County Fairgrounds Board understand how to create and implement a successful community outreach component for their strategic plan planning process
- Clearly outline a few options for project management – with consultant involvement and with options for board, staff, and volunteer leadership

Deliverables:

- 1) Group has basic vision for their project & understanding of project elements
- 2) Group creates top 3-5 priorities for their community outreach
- 3) Group creates initial lists of potential strategic planning teams & members (for recruiting purposes)
- 4) Process timeline & other templates introduced, to be customized and/or filled in later

Time Required: Agenda as represented here – 3 hours (with a 20 min break).
(Can be modified to focus more narrowly, for 2 hours.)

Cost: \$750* Plus an additional \$50 for travel time and mileage. Costs for printing for materials and/or any large scale graphic template(s) (if desired), to be billed separately upon approval. (*Note: \$750 is my non-profit and government rate.)

Other Details:

The above objectives and the specific deliverables can be modified to suit the needs and priorities of this group. If you would like to use part of this workshop as a training for key staff and potential volunteers as well as your board, I would be glad to assist you in doing so.

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