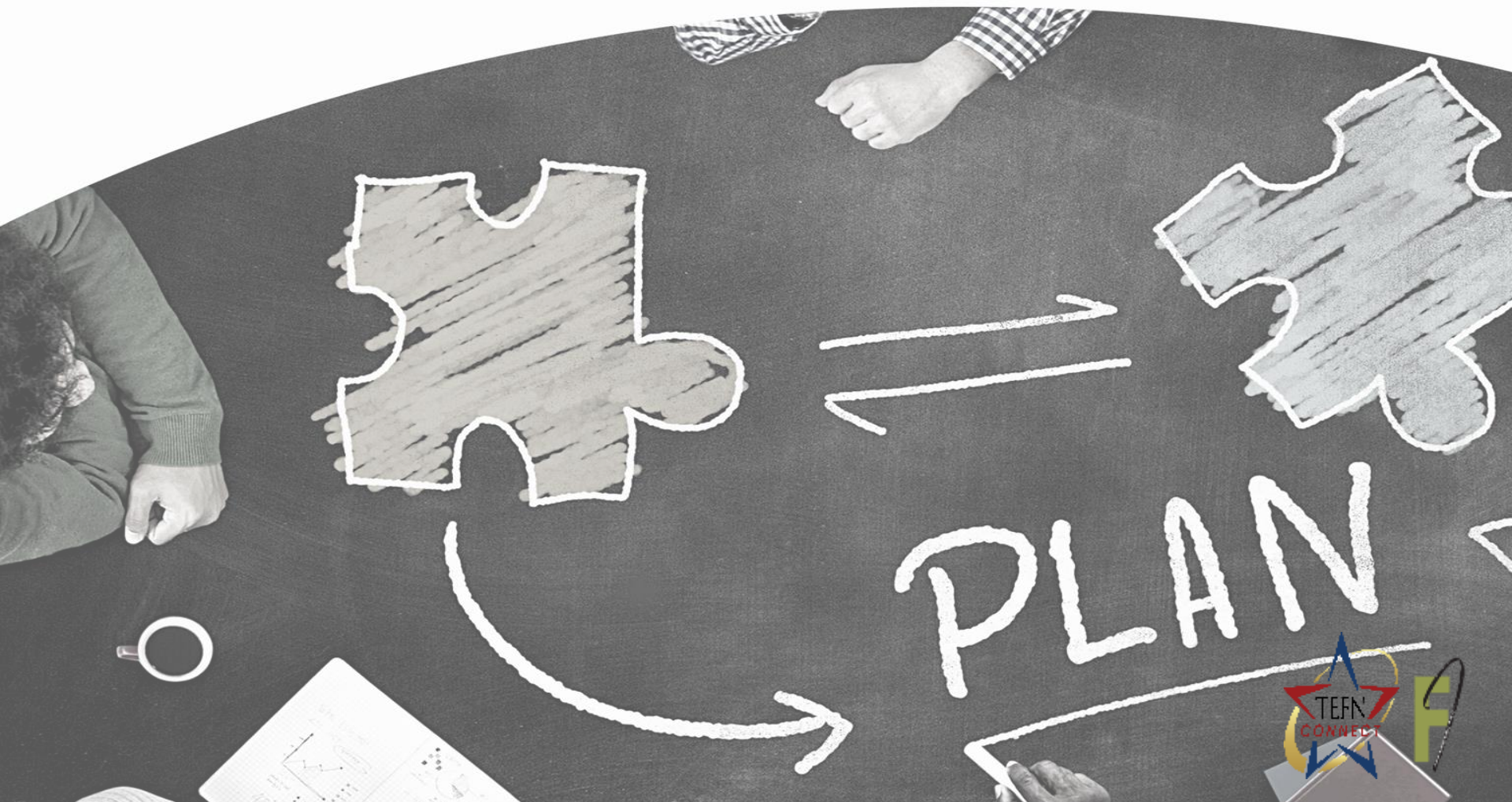


# Webinar: Planning, Planning, Planning

PLANNING IS KEY. LEARN HOW TO PLAN FOR 2022 FOR YOUR  
EDUCATION FOUNDATION USING VIRTUAL TOOLS.  
PRESENTED BY LAURIE CROMWELL, CFRE



# Where to Begin?

- **Why Are We Meeting?**
  - Plan of Work for 2022
  - Specific Problem Trying to Solve with Board of Directors Interaction
  - Assess Program Outcomes, Structures, District Alignment
- **Who is Involved?**
  - Entire Board of Directors
  - Staff
  - District Personnel Determined by Superintendent
  - Others – Depending on the Why Who May Offer Expertise
- **What is Structure?**
  - Less Structure is Best for Participants
  - Not the Format of a Typical Business Meeting
  - 4-5 Hour Timeframe



# Initial Questions to Ask

- What Virtual Platform
- Will be Have an Outside Facilitator involved
- What is the Overall Agenda
- What are our Expected Outcomes



# Let's Get Started

- **Agenda**

- Why Serving on the Board
- Mission Moment
- Mission Activity
- Ice Breaker – 10 Year Viral
- Strengths, Opportunities, Weaknesses, Threats (SWOT Analysis)
- Prioritize Most Pressing Issues
- Develop Goal Areas
- Develop Objectives
- Develop Strategies – Who Will Do What By When & Cost
- Develop Action Plan



# How Do We Do This Virtually?

- **Zoom**
  - Overall Meeting
  - Breakout Rooms
- **Conceptboard**
  - SWOT Analysis
  - Prioritize
- **Combo Zoom and Conceptboard**
  - Breakout Rooms Assigned – Zoom or Specifically Let Them Choose
  - Goal Development
  - Objectives Determined
  - Strategies Created
- **Hints for Success**
  - Take Breaks – After Ice Breaker, After Goal and Objective Development
  - Encourage Those Who May Not Navigate Virtually
  - Make it Fun
- **Follow Up**
  - Create Action Plan
  - Review at Board Meeting
  - May Need to Have Meeting to Review with those who did not Attend
  - Implement and Revise and Revise and Assess



# Let's Do This!

You are Ready for the SWOT Analysis

<https://app.conceptboard.com/board/ehsb-aao6-mmof-yxu7-rxrn>

You are Ready for the Goal & Objective Development

<https://app.conceptboard.com/board/5m45-yliz-qgtf-hkdg-xb50>

Time for the meat and potatoes – Strategy Development

<https://app.conceptboard.com/board/ym15-c42e-ugux-6o6r-3yhr>



# Does this Work?

Samples of Real Work





# Thank you for attending!

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Please complete our *VERY SHORT*  
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