

# Strategic Planning for Results

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# What to Expect Today

## Learning Objectives and Takeaways:

- The importance of a Strategic Plan guiding your work.
- Learn what has worked for Cocoon House.
- A tangible framework for setting your organization up for successful planning during uncertain times.

***A strategic plan will never drive on it's own. It takes structure and a commitment to follow through.***

# Participant Questions

## 1. Poll Question 1: How familiar are you with a Strategic Plan?

- Not familiar at all
- Somewhat familiar
- Experienced
- I could lead this session

## 2. Poll Question 2: Where is your agency at in the Strategic Plan process?

- No known plan
- At the beginning stages
- In the middle of one
- Just wrapping up the completion on one

## Chat Question 1:

- Why do you think a Strategic Plan is important?

## Chat Question 2:

- What do you think happens without a strategic plan?

# Introduction to Strategic Planning: Cocoon House's Strat Plan Timeline

- 4 year Strategic Plan (FY15-18)
- 2 year Transitional GAP Plan (FY19-20)
- ~~4 year Strategic Plan (FY21-24)~~ 2 year Strategic Plan (FY21-22)

# Strategic Planning Setup: Getting Started

- Have an idea of what direction you want the agency to move.
- Conceptual buckets of work.
- Engaging stakeholders:
  - Executive staff
  - Board of Directors/Governance Committee
  - Agency partners and community collaborations
  - Staff at all levels
  - Youth voice and feedback
- Internal Prep Work
  - Data gathering
  - SWOT analysis
- Hiring Consultant/facilitator

# Vital Components

- Guided Facilitation – Board/staff retreat
  - Mission/Vision/Values
  - Identify 5-7 overarching goals
- Post Retreat:
  - Create plan of action
  - Feedback and progress reporting

# Goals, Objectives, & Tasks

- Create Comprehensive Strategic Plan Management Tool
  - Insert goals developed from the retreat
  - Draft 2-3 objectives for each goal
  - Engage staff and youth across the agency
  - Staff help develop tasks and impacts
  - Identify Strat Plan Champions
  - As a SP committee, further develop tasks, timelines, teams.
  - Present SP to leadership staff and implement feedback
  - Present to BOD for approval of working plan

# Turning a Plan Into Action

- Champions Team
- Check in intervals
- Presentation of plan and Engaging Stakeholders
- Daily Work

**Handouts:** Strategic Plan Summary and Comprehensive Project Management Tool



# Checking In & Course Correction

- 2 year refresh
- Don't be afraid to update and modify
- Engage Staff and Board members
- Adding components

# What We've Learned

- Successes
- Challenges
- Food for thought....

# Q & A Discussion

# Thank you!

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Please feel free to contact us with any further questions!

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