



**DHPS|NY**  
DOCUMENTARY HERITAGE  
& PRESERVATION SERVICES  
FOR NEW YORK

## *Strategic Planning Curriculum*

**The DHPSNY Strategic Planning Curriculum is designed to assist small- to medium-sized institutions to engage in strategic planning in a thoughtful way. The program consists of two webinars administered approximately four months apart with assignments and a retreat occurring between the two webinars.**

**At the end of the process, your organization will have produced a three year strategic plan.**

### **THE PROCESS**

Prior to the first webinar, your institution will be assigned a facilitator who will provide guidance throughout the strategic planning process.

#### **WEBINAR #1**

This two hour webinar will discuss the strategic planning process and provide an overview of the DHPSNY Strategic Planning Curriculum. Special tools for preliminary data collection, including an online survey customized for your institution, will be covered during this webinar.

This webinar should be attended by the institution's designated leader(s) for the strategic planning process. Additional members of your board and staff are also welcome to attend.

#### **HOMEWORK #1**

Your institution will be responsible for collecting data from board and staff members, as well key stakeholders, through an online survey customized for your institution by your facilitator. This survey should be completed by most, if not all, board and staff members and will help to highlight key areas that should be addressed in the strategic plan and maximize time at the retreat by promoting early thinking on issues.

Based on analysis of the collected data, your strategic planning leaders(s) and facilitator will create an agenda to focus discussions during the on-site retreat.

### **RETREAT**

Depending on your institution's needs, your facilitator will schedule a partial- or full-day retreat at which the facilitators will guide participants in identifying areas of need, establishing goals and objectives, and unifying behind a set of clear strategies.

The retreat should be attended by the entire board and key staff members.

#### **HOMEWORK #2**

Following the retreat, your facilitator will create a working draft of a strategic plan to serve as a framework for your institution. From this document, your institution will complete the Strategic Plan with guidance via phone and email from your facilitator.

**WEBINAR #2**

In the second, and final, webinar of the process, the importance of receiving formal board approval of the strategic plan will be stressed, along with recommendations for implementing the plan and tracking institutional progress.

This webinar should be attended by the institution's designated leader(s) for the strategic planning process. Additional members of your board and staff are also welcome to attend.

**FOLLOW-UP**

The final strategic plan must be submitted to DHPSNY following board approval.