



**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, including organizations (and archival units within larger organizations) with no previous strategic planning experience. In conjunction with the New York Council of Nonprofits (NYCON), DHPSNY has developed a streamlined process to guide organizations in the development of a three year strategic plan, consisting of webinars, data collection, a virtual retreat, and follow-up engagement.

### ***Facilitator Assignment***

After being selected via an application process, participating organizations will be assigned a facilitator. Facilitators are drawn from DHPSNY and NYCON staff and work closely with an organization to guide them through the strategic planning process.

### ***Introduction Webinar***

This one 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.

Organizations selected in the same award period will participate in the initial webinar as a group, which will typically be scheduled for shortly after an organization has been selected for participation.

### ***Data Collection***

Following the webinar, the assigned facilitator and the site representative will customize a detailed survey that is then disseminated via SurveyMonkey to a pool of key stakeholders, generally including all Board members, staff members as appropriate, and any other individuals with special in-depth institutional knowledge. When requested, the facilitator will distribute printed copies of the survey. Your institution will be responsible for collecting data from stakeholders in a timely manner.

The survey results 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. Utilizing data from the survey, the facilitator will prepare a detailed survey analysis, along with recommendations for 3 to 7 organizational priorities (including a minimum of 2 collection stewardship priorities) and an agenda for the facilitated retreat.

### ***Virtual Facilitated Retreat***

Your facilitator will schedule a facilitated retreat that should be attended by the board and key staff members. It will be conducted via video or conference call, with platforms provided by DHPSNY staff. The facilitated retreat will consist of a half-day session of lively discussion regarding possible goals, milestones, and strategies, led by the facilitator.

### ***Draft Strategic Plan & Completion***

Following the retreat, the facilitator will prepare a draft of a partially-completed three-year strategic plan, which is then completed by the site representative, who makes final decisions concerning time frames and assigned responsibilities. The Facilitator will continue to be available to your organization via phone and email to assist in the completion of the draft.

DHPSNY requires formal approval of the completed strategic plan from the organization's Board of Directors. A copy of the approved final plan must be submitted to DHPSNY staff.

### ***Implementation Webinar***

Once an organization has submitted a Board-approved Strategic Plan to DHPSNY, they will receive access to the pre-recorded second webinar consisting of guidance on implementing the strategic plan and advice on evaluating its process.

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

### ***Half-Day Support Program***

In addition to receiving access to the pre-recorded webinar upon completion of their plan, sites will be offered a half-day support program (workshop or targeted training) intended to strengthen their ability to implement a goal in their strategic plan. These support programs will be built around subjects such as diversity and inclusion, bylaw revisions, membership recruitment, and fundraising and fund development. Facilitators will work with sites to select an appropriate topic.

The selected support program will be delivered within six months of formal submission of the Strategic Plan. These support programs will be conducted remotely via video or conference call.