

# socialimpactadvisors

## Impact Focused Strategic Planning: Coaching Option

Team homework due at least 48 hours in advance of each meeting

Recap from coach within 48 hours of each meeting

Some meetings can be attended by a core group- others by the larger collective: TBD

Elapsed time will depend on meeting frequency- with coach at least once per month, independent teamwork at least once per month.

Notes for scheduling:

\*It is ideal if working groups can meet in-between coaching calls with SIA for 2hrs. Meeting in between coaching calls will give you time to complete your work and consult with each other.

\*Other groups have found success meeting for a 1/2hr as a working group directly after our call. Meeting directly after allows time to debrief and distribute tasks for the next few weeks.



Meeting #	Date	Focus	Content	Homework
<b>Meeting 0</b> Core team		<u>Pre-kickoff</u>	<ul style="list-style-type: none"> <li>• Introductions</li> <li>• Questionnaire</li> <li>• Learning about Sustainable Peterborough</li> </ul>	Establish working team
<b>Meeting 1</b>  Online 1.5 hrs <i>Working team</i>	<b>Jan. 22<sup>nd</sup></b>	<u>Kick-off</u> Intro to Impact Focused Strategic Planning	<ul style="list-style-type: none"> <li>• Introductions</li> <li>• Learning about impact and strategic planning</li> <li>• Review workplan</li> <li>• Roles and expectations</li> </ul>	<ul style="list-style-type: none"> <li>• Establishing work plan and meeting dates</li> <li>• Draft population-level impact statement</li> </ul>

Meeting #	Date	Focus	Content	Homework
<p><b>Meeting 2</b> Online</p> <p>Coaching call 1.5 hrs Working team</p>	<p><del>Late Jan.</del> <b>Feb. 13<sup>th</sup></b></p>	<ul style="list-style-type: none"> <li>Establish work plan and working team</li> <li>Introduction to Population level impact and Theory of Change</li> </ul>	<ul style="list-style-type: none"> <li>Finalize workplan and dates</li> <li>Population Level Impact</li> <li>Introduction to TOC</li> </ul>	<ul style="list-style-type: none"> <li>Draft impact statement before first workshop</li> </ul>
<p><b>Meeting 3</b> In-person</p> <p>Workshop 1 Full day <i>Full collective?</i></p>	<p><del>Feb 10-14</del> <b>March 16<sup>th</sup></b></p>	<ul style="list-style-type: none"> <li>Review and further refine intended impact</li> <li>Intro to TOC</li> <li>Draft/refine TOC</li> </ul>	<ul style="list-style-type: none"> <li>Review and refine intended impact</li> <li>Expand on TOC and suggested frameworks</li> <li>Talk through Canadian Sustainability examples</li> <li>Draft TOC in logic flow format</li> </ul>	<ul style="list-style-type: none"> <li>Impact statement and glossary</li> <li>Reading as assigned</li> <li>Produce refined working draft of TOC- tying II outcomes to strategies</li> </ul>
<p><b>Meeting 4</b> Online</p> <p>Coaching call 1.5 <i>Working team</i></p>	<p><b>Week of April 6<sup>th</sup></b></p>	<ul style="list-style-type: none"> <li>Finalize working version of TOC</li> <li>Introduce engagement and validation approach</li> </ul>	<ul style="list-style-type: none"> <li>Final feedback on working version of II and glossary</li> <li>Discuss feedback on working version of TOC</li> <li>Introduce key informant and engagement approach- to help strengthen your Theory</li> <li>Prioritize topics for key informant engagement and validation</li> </ul>	<ul style="list-style-type: none"> <li>Finalize working draft of II statement and glossary</li> <li>Refine working version of TOC</li> <li>Create engagement and validation plan – identify key questions and timeline</li> </ul>

<b>Meeting #</b>	<b>Date</b>	<b>Focus</b>	<b>Content</b>	<b>Homework</b>
<b>Meeting 5</b> Online  <i>Coaching call</i> 1.5 <i>Working team</i>	<b>Week of April 27<sup>th</sup></b>	<ul style="list-style-type: none"> <li>Finalize TOC</li> <li>Refine engagement and validation plan</li> <li>Refine drafts of research tools (e.g. interview guides)</li> </ul>	<ul style="list-style-type: none"> <li>Final feedback on working version of TOC</li> <li>Review and refine engagement and validation plan and approach</li> <li>Review and refine drafts of engagement tools</li> </ul>	<ul style="list-style-type: none"> <li>Finalize working TOC for pressure testing</li> <li>Finalize research and analysis work plan</li> <li>Finalize research tools and analytical approaches</li> <li>Begin conducting engagement and validation</li> </ul>
<b>Meeting 6</b> Online  <i>Check-in call</i> 1hr <i>Working team</i>	<b>Week of May 11<sup>th</sup></b>	<ul style="list-style-type: none"> <li>Check-in on engagement and validation</li> </ul>	<ul style="list-style-type: none"> <li>Discuss validation progress so far</li> <li>Review initial findings</li> </ul>	<ul style="list-style-type: none"> <li>Conducting engagement and validation?</li> </ul>
<b>Meeting 8</b> Online  <i>Coaching call</i> 2hrs <i>Working team</i>	<b>Week of June 1<sup>st</sup></b>	<ul style="list-style-type: none"> <li>Review the implications of your engagement findings</li> </ul>	<ul style="list-style-type: none"> <li>Review interim findings</li> <li>Discuss conclusions from research and analysis and implications for TOC and II</li> <li>Revise TOC Summarize 'a-ha observations' and key implications for action</li> </ul>	<ul style="list-style-type: none"> <li>Summarize findings</li> <li>Refine TOC</li> </ul>

Meeting #	Date	Focus	Content	Homework
<p><b>Meeting 9</b> In-person</p> <p><i>½ day workshop to establish priorities</i> 4hrs <i>Collective?</i></p>	<p><b>Week of June 22<sup>nd</sup></b></p>	<ul style="list-style-type: none"> <li>• Introduction to action planning</li> <li>• Draft an action plan</li> <li>• Establish strategic priorities</li> </ul>	<ul style="list-style-type: none"> <li>• Introduce action planning</li> <li>• Draft action plan</li> <li>• Establish strategic priorities</li> </ul>	<ul style="list-style-type: none"> <li>• Draft action plan</li> <li>• Establish strategic priorities</li> </ul>
<p><b>Meeting 10</b> Online</p> <p><i>Coaching call</i> 1.5hrs <i>Working team</i></p>	<p><b>July</b></p>	<ul style="list-style-type: none"> <li>• Refine action plan</li> <li>• Refine strategic priorities</li> </ul>	<ul style="list-style-type: none"> <li>• Review and refine action plan</li> <li>• Refine strategic priorities</li> </ul>	<ul style="list-style-type: none"> <li>• Finalize action plan and strategic priorities</li> <li>• Plan for broader community roll out.</li> </ul>
<p><b>Meeting 11</b> Online</p> <p><i>Coaching call</i> 1.5hrs <i>Working team</i></p>	<p><b>July</b></p>	<p>Additional time to support completing your plan</p>	<ul style="list-style-type: none"> <li>• Anticipated content: governance, measurement, community roll out</li> </ul>	

Meeting #	Date	Focus	Content	Homework
<p><b>Meeting 12</b> Online</p> <p><i>Coaching call</i> <i>1.5hrs</i> <i>Working</i> <i>team</i></p>	<p><b>August</b></p>	<p>Additional time to support implementing your plan</p>	<ul style="list-style-type: none"><li>• Anticipated content: governance, measurement, community roll out</li></ul>	