



## STRATEGIC PLANNING & FACILITATION ASSISTANCE

**PURPOSE:** To gather, synthesize and present relevant information to board members and assist them in developing a focused strategy that responds to defined critical objectives.



**SUMMARY:** FPMR can assist associations, non-profits, and other organizations by researching, compiling, and communicating information received from stakeholders, (and/or through the analysis of other data already held by the organization.) We then facilitate a face-to-face or virtual planning session where a limited number of strategic objectives are identified,

and a focused approach with accountability and resource allocation factored into the process. A final component deals with coaching volunteer leaders in ongoing implementation and reporting on plan objectives. This is a typical strategic planning model and can be customized to suit the needs of the organization. Quote provided following an exploratory call.

### Special Offer: Small Association Planning Assistance Package

Small associations and organizations also have strategic planning needs, but often must rely on volunteers to carry out a planning session. Results can vary a great deal depending on the capabilities of the volunteers involved. FPMR is pleased to offer a low-cost strategic planning program for **\$1,250** which includes the following:



- *Creation of a Survey Monkey survey instrument using 10 standard questions and 5 custom questions. (link provided to the association for their internal distribution)*
- *Compilation of survey results to a report with facilitator observations and link to raw survey responses*
- *4-hour facilitated virtual (via Zoom/GoToMeeting) or face-to-face session at FPMR offices in Raleigh (masks required until COVID clearance is issued.) Deliverable: 2 priority focus areas and tactical implementation steps.*
- *Creation of final report of session and follow-up conference call with board re: how to implement and track.*

### FACILITATOR



Jim Booth, MSM, CAE, is General Manager of FirstPoint Management Resources. He has worked with associations and non-profits for 39 years. For FirstPoint Jim supports all account managers, strengthens client relationships, and engages in special project work. He has served state, national, and international associations in various capacities including membership, operations, marketing, meeting planning and Executive Director/CEO. He has facilitated strategic planning sessions for local, national, and international associations.