

**Washington County
Community
Action Agency**

Planning Retreat

April 8, 1989

United Church of Christ

Forest Grove, Oregon

Presented by John Larson

WCCAO PLANNING RETREAT

APRIL 8, 1989

Agenda for ACTION

- 8:30 GATHERING - Coffee, Juice, Rolls,.....Staff
Registration, Group Information
- 9:00 OPENING PERIOD - Intros, Overview.....Jim Sehon, Jerralynn Ness
Group Leadership Exercise.....John Larson
- 9:15 EVALUATION as a Skill.....John Larson
- 9:30 PROGRAM REPORTS - 7-10 min.
Children and Youth.....Cathy Wise
Housing and Energy.....Leon Laptook
Client Services.....Cheryl Hilbert
Resource Development.....Pam Brousseau
Hunger and Nutrition.....Val Donley
Administration.....Jerralynn Ness, Holly Freeman
- 10:45 BREAK
- 11:00 BRAINSTORM as a skill.....John Larson
- 11:15 EVALUATION of progress,
Evaluation of Strategic Plan.....Group
and first year implementation
- 12:30 LUNCH BREAK
- 1:15 SETTING GOALS as a skill.....John Larson
- 1:30 GROUP WORK - 1989-90 Goal setting.....Group
- 3:30 GROUP REPORT/DISCUSSION.....John Larson
- 4:25 CLOSING REMARKS.....Jerralynn Ness, John Larson
- 4:30 FINISHED.....All Staff

The following week Jerralynn, John Vazquez and Jim Sehon will meet with John Larson to debrief and evaluate the retreat process and results.

GROUP LEADER

Responsibilities

1. Lead Discussions as Assigned.

- A. Keep Group on Track.**
- B. Encourage All to Contribute.**
- C. Maintain Positive Atmosphere.**

2. Represent the Group.

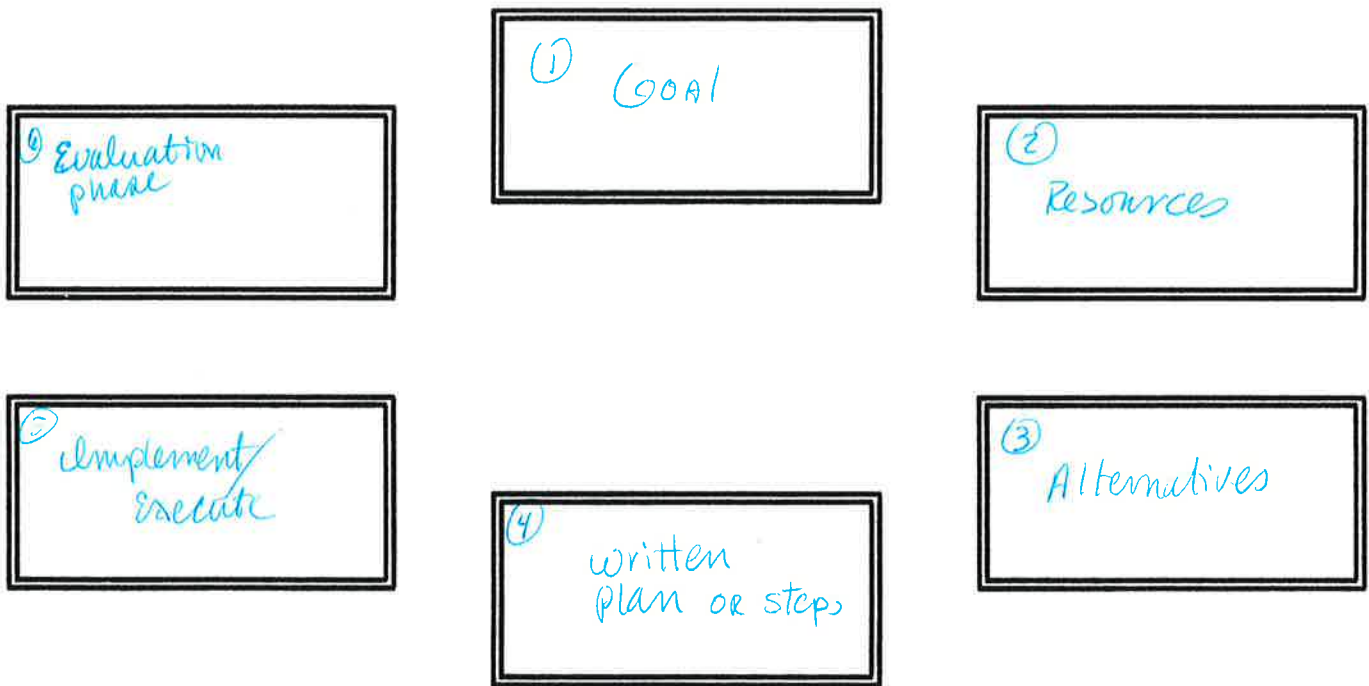
- A. Present Group Discussion Results.**
 - 1. Consensus**
 - 2. Majority**
 - 3. Minority**
- B. Participate in Decisions of the Larger Group.**

Lead Towards ACTION.

Planning

Planning is: Consciously choosing in present what future will look like.
Planning is always in action.

The Planning Cycle



Planning Cycle Worksheet

Objective :

Goal or Task :

Resources :

Options :

Workplan :

Action Date :

Evaluation Date :

Evaluating

EVALUATING IS: Comparing actual results with expectations to make changes for improvement.

IT REQUIRES:

1. Original Goals / Performance Criteria
2. Actual results in measurable / definable form
3. official comparison b/T the 2
4. Research why there were differences
5. Changes in Performance / Behavior in order to incorporate

EVALUATION SHOULD OCCUR:

1. Before
2. During
3. After

PARTS OF AN EVALUATION:

1. Performance
2. Program a problem? Resources, etc;
3. Personnel - those delivering - right people
- properly trained
- Attitude
4. Participants targeted correctly

THE RESULT:

Evaluation Guide

Stated Goal or Task :

Performance Range :

Minimum

Expected

Superior

Evaluate

Actual Results :

Program :

Personnel :

Participants :

ACTION STEPS FOR IMPROVEMENT :

- 1.
- 2.
- 3.

Restatement of Goal :

Brainstorming

Creativity is *thinking* looking at existing ideas in new ways

Brainstorming is *structured* creativity

Rules for Brainstorming

1. Everyone is involved & actively focused on topic
2. Sky is the limit / every idea is acceptable
3. To be effective ideas should be given quickly & briefly
 - a. No hands
 - b. No explanations
4. No judgments
5. Write down / post - so they are visible & stimulate more ideas

Evaluate ideas for

1. Fitting ^{our} objectives / goals / missions
2. Fitting our resources
3. Priority

The Result

Setting Goals

Goal Setting is *descriptive*

Goals serve as *positive motivators*

Goals should be

S *pecific*

M *easurable*

A *ttainable*

R *elevant*

T *rackable*

Goals should be *written* and *reviewed*.

Goal Development Worksheet

Objective : _____

Goal or Task :

Measurement : (Quantity, Deadline)

Progress Reports Due :

Who is Responsible :

Performance Levels :

Minimum

Expected

Superior

Obstacles :

Resources :

NEXT STEPS TO ACTION : (What, When, Who)

- 1.
- 2.
- 3.

Restatement of Goal

Visions Business Development

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Helping You See Your Business More Clearly Through

Goal Setting, Planning, Team Building, Meeting Planning

About John Larson

Graduated from Portland State University, 1971, BS in Business Administration. Study Emphasis in Management Science, Forecasting, Modelling, and Strategic Planning.

President of Portland Vacuum & Appliance, Inc., provider of Factory Warranty representation for Major Companies, since 1971.

Volunteer trainer of Leaders in the Boy Scouts of America since 1977. Currently serving on the Executive Board as District Chairman for the East Washington County Area, responsible for the efforts of 1100 volunteers serving 3500 youth.

Course Director for Leadership Training Programs ranging from an hour for a few people, to week-long events for hundreds.

Responsible for designing curriculum for Nationally implemented Training Programs.

A practical, Action-oriented Leader, respected by those in the community.