

**CHAUTAUQUA OPPORTUNITIES, INC
OPERATIONS PROCEDURE**

TITLE: Strategic Planning

EFFECTIVE DATE: 2008

AREA/NUMBER:

REVISION DATE: 2011; 02/2020

Every three years, Chautauqua Opportunities, Inc. engages in a comprehensive strategic planning process. The plan is directly responsive to the identified recommendations in the Community Needs Assessment.

Staff, management, Board members, customers, and community partners provide input and feedback into the process and ultimately the development of the goals that make up the plan.

The Director of Grants & Systems Compliance coordinates the process and the Senior Management Team, along with Chief Executive Officer, acts as the steering committee throughout the process.

Board members, staff, customers, and community partners participate in a series of focus groups which provide insight and suggestions that form the final goals and objectives. **This step includes a review of the Mission Statement as part of the Board and Management Team Focus Group. If the Mission statement is revised or changed, then the draft goes to the full Board for approval.**

Broad strategic issues are identified from the Community Needs Assessment, which are mission focused and lead to the development of the final plan. The Strategic Plan seeks to develop consensus, ensure thoughtful resource allocation, and make planning an inherent part of the agency's on-going operations. Individual employee goals come directly from the implementation of the Strategic Plan. Each employee's merit pay is connected to goal achievement & reviewed semi-annually or quarterly if problematic.

The final plan is approved by the Board and then disseminated to staff, Board, partners, funders, community, etc.

Quarterly reviews of progress on goals and objectives are scheduled and done as part of the full management team meeting. The Systems Compliance Coordinator electronically maintains the original plan and any updates as they occur.