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| Quarterly Evaluation and Planning Rhythm (for a Strategic Plan completed in December) | | | |
| Participants Those involved in the planning and implementation. | **Rational Objective**  Assess accomplishments and plan for the next period | **Experiential Objective**  Affirm and re-energize individuals and teams | **Product/Outcome**  Clear tasks and roles for the next period |

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| **March** | **June** | **Sept.** | **Dec.** |
| Quarterly Planning Event  * Review of Vision, Obstacles, and Strategic Directions * Evaluation of 90 Day Action Plan: Brainstorm of accomplishments, what didn’t get done, blocks, learnings, and implications * Plan for next 90 days: Measurable accomplishments on quarterly timeline, 90-day action plan for each accomplishment | Quarterly Planning Event  * Review of Vision, Obstacles, and Strategic Directions * Evaluation of 90 Day Action Plan: Brainstorm of accomplishments, what didn’t get done, blocks, learnings, and implications * Plan for next 90 days: Measurable accomplishments on quarterly timeline, 90-day action plan for each accomplishment | Quarterly Planning Event  * Review of Vision, Obstacles, and Strategic Directions * Evaluation of 90 Day Action Plan: Brainstorm of accomplishments, what didn’t get done, blocks, learnings, and implications * Plan for next 90 days: Measurable accomplishments on quarterly timeline, 90-day action plan for each accomplishment | Annual Planning Event  * Review of Vision, Obstacles, and Strategic Directions * Evaluation of 90 Day Action Plan: Brainstorm of accomplishments, what didn’t get done, blocks, learnings, and implications * *Development of measurable accomplish-ments for next 12 months on quarterly calendar* * Plan for next 90 days: Measurable accomplishments on quarterly timeline, 90-day action plan for each accomplishment |
| **2-3 hours** | **2-3 hours** | **2-3 hours** | **Half day** |

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