**Inventory for Use in Developing a Meta-Strategic Plan** October 11, 2016

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For the UCCS Professional Development Association

**Strategic Planning Workshop- Part I: Preparing to Plan: Tips for completing this exercise:**

1. All entries in gray are my own entries offered as examples. Please delete my text and enter your own as you complete each section.
2. The table will expand as you enter text. You may have to adapt the table itself for your own use by inserting or deleting lines. If you need additional columns, save the example document twice with two different names, (AAB\_Strategic Plan Part I and AAB\_Strategic Plan Part II) and continue completing as many columns as you need in the Part II document.
3. This table is an example of one venue for preparing to complete a Meta-Strategic Plan. You may wish to use a journal or other more “creative” way of identifying each component of the table below.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Social Venues/Units** 🡺 (my relationship with…) | Self | Marriage | Grown Daughter | Work | Volunteer Mentorship |
| **Values** | Being healthy in mind, body and spirit. Loving myself with all my imperfections and weaknesses, strengths and possibilities. Nature and the beauty and mystery of the universe. Learning, humility, openness, adventure, exploration, wisdom, playfulness, passion, grace, peace, love, God, goodness, strength. | I value a marriage in which love grows as we communicate honestly with kindness and help each other grow into our best selves together. I value our differences as a challenge and call to complimentary.  | Remaining close despite distance. Being an encouraging presence. Respecting her adult choices. Visits, either way. Her trust in me.My fierce, unconditional love. | Working with integrity and diligence. Servant leadership. Creating and developing. Contributing to a happy, healthy work environment. Continued professional growth. Honest, caring, respectful, appreciative interactions. Constructive feedback. Appreciation Making a difference and adding value through the work I do. Participating in Diversity and Inclusion activities. Supporting student achievement and success. | Trust and respect placed in me by mentees. Ability to provide guidance and share part of their journey. Ability to help support their next steps in life and serve as their champion. Fostering and witnessing the joy in big and little accomplishments. |
| Overarching Values Across Venues:I value being a woman who is encouraging vs critical; who is inclusive, open and respectful of others in all their diversity, is committed to equity and social justice and all that is good and honest and real. I value striving for excellence but not perfection. I value relating with others and being in relationship with family and friends. I value fostering a spirit of hospitality and aim to ensure people experience a sense of belonging when they are anywhere that I am. I value fostering a spirit of gratitude and abundance over one of need and want of what I don’t have. I value fostering a “growth mindset” over a “fixed mindset.” I value a spirit of exploration, adventure and willingness to try new things and to discover and create the unfolding mystery of life. |
| **Social Venues/Units** 🡺  | Self | Marriage | Grown Daughter | Work | Volunteer Mentorship |
| Strengths |  |  |  | Leadership, organization, initiative, enthusiasm, creativity. Involvement in broader U while maintaining focus on my key responsibilities. Participation in Leadership Academies I &2. |  |
| Weaknesses |  |  |  | Need/want a better command of Excel; My enthusiasm and passion can be a strength but it can also get away from me and cause me to interrupt thus I want to practice being a strong listener without interrupting. |  |
| Opportunities |  |  |  | UCCS and CU leadership development opportunities. Growth of summer bridge program. |  |
| Threats |  |  |  | Raising costs not planned for in grant budget. Potential staff turnover. |  |
| **Social Venues/Units** 🡺  | Self | Marriage | Grown Daughter | Work | Volunteer Mentorship |
| Goal # 1 |  |  |  Build in trips to Seattle | Take: Leadership Academy II |  |
| Goal # 2 |  |  |  | Submit Abstract for conducting a Diversity and Inclusion Workshop Presentation |  |
| Goal #3 |  |  |  | Take Excel courses on Lynda.com and gain skill using M-Fin |  |
| Goal #4 |  |  |  | Work with team to introduce the new VCSS to the Grant, seek his input direction and involvement. |  |
| Overarching Goals  |