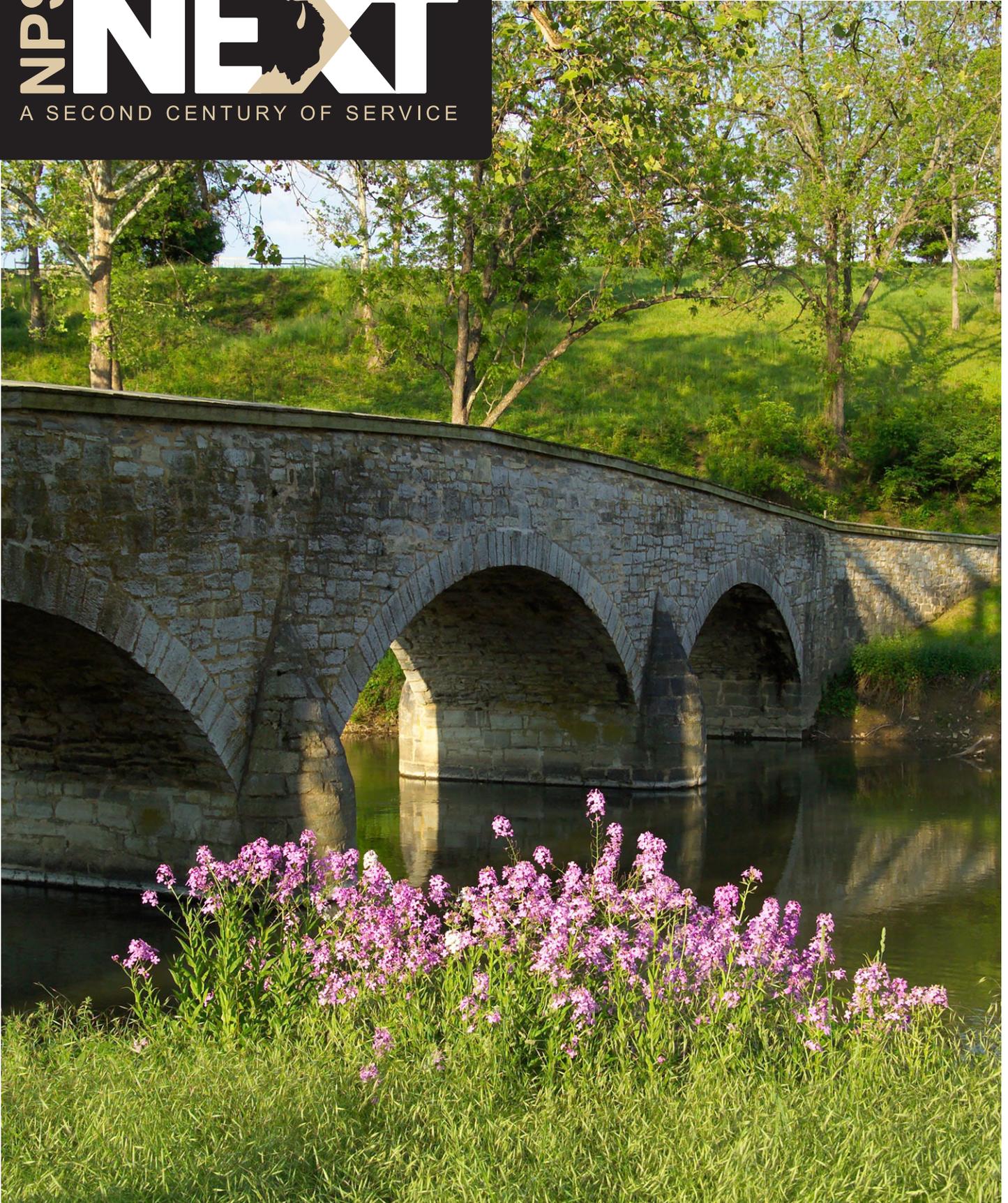




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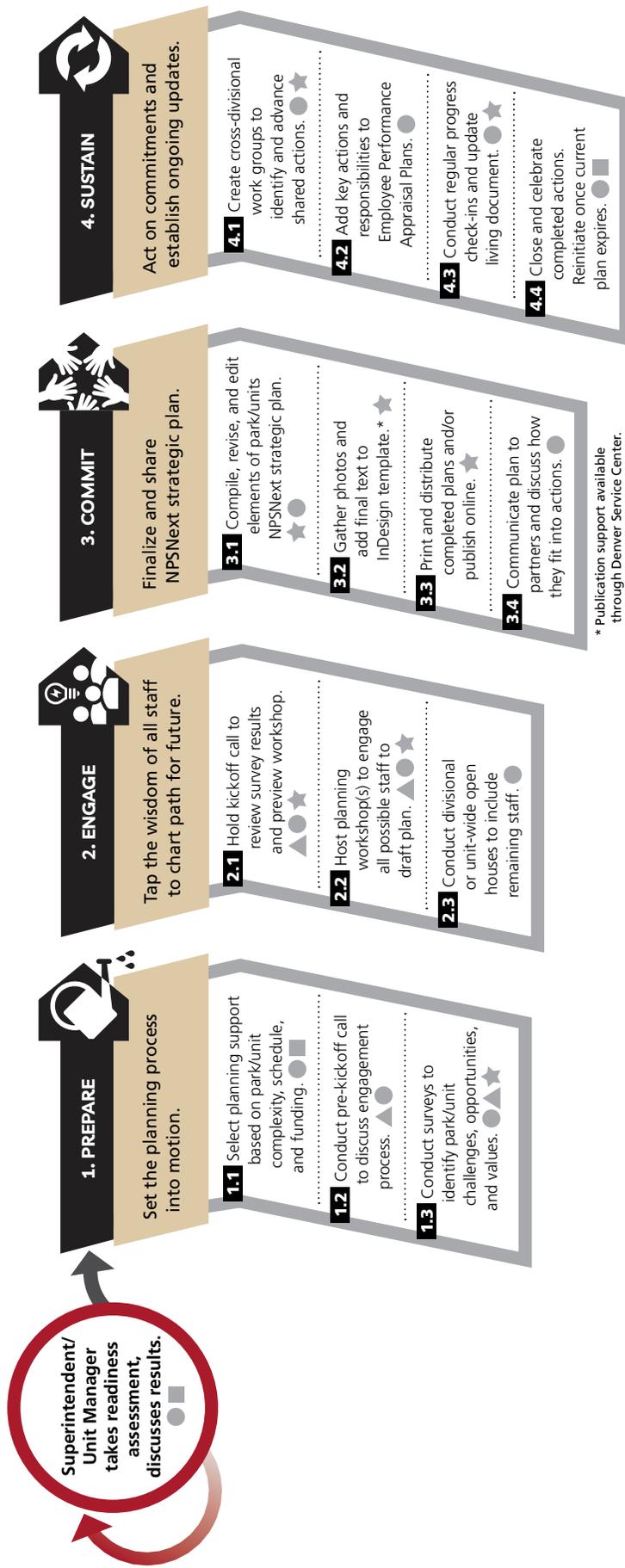
NPSNEXT FACILITATOR'S GUIDE

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NPSNext Workflow Diagram



LEGEND

- Park/Unit Leadership
 - Regional/Program Leadership
 - ★ Park/Unit Employees
 - ▲ NPSNext Facilitator
- * The task leader is the first shape for each step.

PREPARATION

1.1 Discuss Expectations, Timeline, and Possible Challenges with Park/Unit Management

So, you've been selected to serve as an NPSNext facilitator by a park or program. Now what? Before accepting the role of facilitator, make sure to discuss the details with park/unit management. Once you accept, you will most likely need information on how to proceed.

This facilitator's guide is intended to provide a general timeline and support materials for NPSNext pre-workshop planning activities, as well as a detailed agenda for the three-day planning workshop. While this facilitator's guide is primarily built for the three-day, face-to-face workshop model, virtual considerations have been added so that sessions can be divided over multiple days and delivered in person or virtually.

Workflow Process

Step	When	What	Lead and Who is Involved
1.1	Before accepting facilitator role	Discuss expectations, timeline, and possible challenges with park/unit management	You and park/unit management
1.2	Week 1	Conduct pre-kickoff call to discuss the engagement process	You and park/unit management team
1.3	Weeks 2–4	Conduct park/unit-wide survey to identify challenges and opportunities	Park/unit management and all park/unit employees
	Weeks 5–6	Review the results of the SWOC survey and the Core Values survey and consolidate into handouts	You and park/unit management
2.1	Week 7	Hold kickoff call to review SWOC survey results and preview workshop process	You and all workshop participants and/or all unit employees
2.2	Week 8	Hold NPSNext workshop	You and 20 to 30 park/unit employees
2.3	Weeks 9–12	Park/unit leadership conducts additional engagement to include staff who could not participate in workshop	Park/unit management and remaining park/unit employees

As an NPSNext facilitator, your responsibilities to the park or unit end after the planning workshop (step 2.2). You may help to engage and solicit input from other park/unit employees (who did not get a chance to participate in the planning workshop) and/or review the final plan, if requested and available. The final sessions of the planning workshop, though, are designed to help the park/unit determine the next steps to complete the engagement and commitment phases of the NPSNext workflow.



1.2 Conduct Pre-Kickoff Call to Discuss Engagement Process

To initiate the NPSNext strategic planning process, set up a meeting with the park/unit leadership to discuss the pre-workshop preparation and the workshop logistics. This is also the time when you and management should discuss any concerns (logistics, staff attitude, safety, travel) about engaging employees in the process.

Example Call Agenda:

Discuss Plan Purpose and Engagement Process

- **Purpose of Strategic Plan** – Briefly discuss the purpose and lifespan of this strategic plan (three to five years). Outline the components that will be created during this process and their purpose and who should be involved in each component:
 - Values (all employees, will roll up to Park/Unit Core Values)
 - Vision (planning team)
 - Unit Mission (planning team)
 - Emphasis Areas (planning team)
 - Outcomes (planning team)
 - Key Actions (all employees)
- **Roles and Responsibilities**
 - Role and any specific requests of Superintendent/Unit Manager during workshop and afterwards
 - Role of document keeper for the park/unit
 - Role of management team and/or planning team
- **Participant List** – Who will attend the workshop? If in person, the maximum that can participate in a meaningful way is 20 to 30 participants. Encourage a mix of employees in terms of grade, length of time at the park/unit, age, and engagement level.

Determine Logistics

- **Schedule** – Confirm when the planning workshop will be held.
- **Format** – Will the workshop be face-to-face? Virtual? A combination? Over what timeframe? Individual, Small Group, Large Group—does this group work better in certain types of formats?
- **Materials** – Determine who will supply what? Suggest the park/unit provide flip chart and projector. Facilitator to bring dots, markers, and stickies.
- **Costs** – What will park/unit pay for? (e.g., travel, document production, etc.)

Schedule Pre-workshop Actions

- Park/unit distributes and participates in Strengths, Weaknesses, Opportunities, Challenges Survey (SWOC) (appendix B) and the Core Values survey (appendix C) to all employees.
- Park/unit should pull Federal Employee Viewpoint Survey report to use during workshop.
- Park/unit should pull and share previous purpose/mission statements and other strategic or relevant plans the park/unit may have previously had such as the Foundation Document, Interpretive Plans, Resource Management Plans, etc.
 - Ask: What other plans do you think would be valuable to have available during the workshop?



1.3 Conduct Surveys to Identify Unit Challenges, Opportunities, and Values

Strengths, Weaknesses, Opportunities, and Challenges

The park/unit management will send out the SWOC survey to all park/unit employees to complete. You will be responsible for reviewing and summarizing the results to share with the park/unit.

Pre-workshop Survey – Park Superintendent/Unit Manager Responsibility

- Park superintendent/unit manager sends SWOC survey (appendix B) and the Core Values survey (appendix C) out to all park/unit employees with a brief description of the NPSNext planning process, an explanation of expectation of employee engagement, a due date for the surveys, and a “hold the date” for the kickoff call to review the survey results (step 2.1).
 - Allow two to three weeks for employees to respond
 - Participants should be able to provide responses anonymously
- Optional online SWOC and Core Values surveys are available on NPSNext website for park/unit use.

Pre-workshop Survey – Facilitator Responsibility

- Preparing SWOC Summary for review in pre-workshop call (step 2.1) and reference during workshop (step 2.2)
 - Summarize responses per question
 - Code/group responses into themes or topics
 - Avoid use of direct quotes, except for headline question #5
- Use SWOC summary throughout workshop
 - Strengths – internal ⇒ inform core values, mission, and vision
 - Weaknesses – internal ⇒ emphasis area and outcome development
 - Opportunities – external ⇒ actions
 - Challenges – external ⇒ actions
- Preparing Core Values summary
 - List 10 top values and number of responses received
 - Compile individual responses for the meanings of each of the 10 top values
 - Reference during Core Values session to represent the values of all park/unit employees

ACTION

2.1 Hold Kickoff Call to Review Survey Results and Preview Workshop

Once you've summarized the responses to the SWOC survey and identified themes from each area, it is time to share with the workshop participants. It is useful to do this in advance so participants have time to think about what was revealed in the anonymous survey and come to the workshop ready to discuss solutions, rather than rehash issues (Core Values results will be reviewed during the workshop).

Draft Agenda:

- Introductions and ice breaker
- Consider group agreements as this topic can be challenging
- Discuss SWOC Summary with workshop participants to:
 - Build an awareness of responses from colleagues at all levels in different divisions.
 - Begin to understand pivotal issues that impact the park/unit.
 - Influence the direction strategic plan should go to address these concerns and/or pursue future opportunities.
 - Provide background for what is to come, as results are used regularly in upcoming workshop.
- Any reactions? Surprises? Concerns? Issues not likely addressed in the strategic plan?
- Briefly preview workshop agenda, strategic planning process. Be sure to forecast the big thinking they will be asked to do to create a park/unit vision statement and define unit values.
- **[if 2.2 workshop will be virtual]** Tech check for the upcoming workshop
 - Consider offering an open house(s) for participants to sign in and test their setup for the workshop.
 - Consider a conference line for backup if folks have computers without microphones or challenges with internet.
 - Practice sharing screens, turning cameras on and off, raising hands, and switching to break-out rooms, if desired.

ENGAGE
YOUR PEOPLE





2.2 Host Planning Workshop(s) to Engage All Possible Staff to Draft Plan

You’ve been building up to this moment—facilitating the actual NPSNext planning workshop! By now you’ve decided if this workshop will be held in person or virtually (or a combo). Nine sessions are outlined in the following pages and can be facilitated in a three-day workshop or over a longer span, which is recommended if delivered virtually. The sessions are designed to be delivered sequentially, but feel free to swap out activities and/or extend or shorten session timing. As long as you hit the following objectives, you should be on track.

Objective for Three-Day Workshop:

- Discuss and adopt park/unit mission, vision, and core values that guide staff towards desired future.
- Understand the pivotal issues facing park/unit and begin to leverage strengths and opportunities.
- Engage all possible park/unit staff to select key actions to fulfill identified outcomes.
- Leave each session with 80% to 90% drafts of strategic plan elements, which are shown in the graphic below.
- Identify park/unit champions to carry forward and move the components to 95% complete draft in the first step (3.1) of the NPSNext Commit phase.



Overview of Possible Agenda – Face-to-face, three-day workshop

Day 1:

Morning: Welcome, Mission, and Vision

Afternoon: Revisit Mission and Vision, Core Values, Introduce Pivotal Issues

Day 2:

Morning: Pivotal Issues and Emphasis Areas

Afternoon: Outcomes and Introduce Key Actions

Day 3:

Morning: Key Actions

Afternoon: Implementation and Reality Check

Breaks—throughout workshop, strategically use breaks to encourage individual reflection.

Overview of Possible Agenda – Virtual multiday workshop

Week 1

Two to three hours per day (three to five days): Welcome, Mission, Vision, Core Values, Pivotal Issues

Week 2:

Two to three hours per day (three to five days): Emphasis Areas, Outcomes, Key Actions (x2), Implementation and Reality Check.

Take a 15-minute break in each three-hour session. Keep in mind engagement with participants should be regular to keep it lively and engaging—consider use of gifs, stickies, and emojis as ways to answer questions to keep engagement high. Microsoft Forms, individual reflections, and the use of channels to support small group work can also be beneficial.



DAY 1

2.2A Welcome and Purpose of Strategic Planning (1.5 hours)

Definition: Strategic Planning – Answers the questions: Where we are now? Where do we want to be in the near future (typically three to five years)? What are the *most important things* we need to accomplish to get there? How will we review our progress?

Session intent: Set the stage for engagement right up front by including all participants in the icebreaker and introduction activity. Participants gain ownership of environment and process by setting group agreements and learning the logistics of the workshop (in person or virtual).

Result: Participants feel comfortable in the workshop environment, have a clear understanding of process and expectations, and are ready to engage.

Session: Icebreaker and Introduction to Workshop

Time 1.5 hours	Activity	Materials/Notes
30 minutes	Icebreaker and Introductions <ul style="list-style-type: none"> ▶ Name, role at park/unit, number of years you have worked at the park/unit. ▶ Option: One word - What is meaningful about this park/unit? Consider entering words into a wordle after exercise to share at break. ▶ Option: What brought you to work for the National Park Service or for this park/unit? ▶ <i>Virtual Consideration: If virtual, consider additional question so participants can practice use of GIFs, stickies, or emojis.</i> 	Materials: <ul style="list-style-type: none"> ▶ Workbook ▶ Wordle screen ▶ Flip chart (optional)
40 minutes	Strategic Plan Presentation using workbook <ul style="list-style-type: none"> ▶ Review purpose of NPSNext. ▶ Define NPSNext Strategic Plan Core Elements; use strategic planning circle graphic in workbook and PowerPoint. ▶ Show examples of NPSNext strategic plans. <ul style="list-style-type: none"> > <i>Virtual Consideration: provide folder on SharePoint with strategic plan examples and other workshop materials, including the SWOC summary, digital workbook, and copy of PowerPoint.</i> 	Materials: <ul style="list-style-type: none"> ▶ Workbook ▶ PowerPoint with NPSNext intro and elements

Session: Icebreaker and Introduction to Workshop *continued*

Time 1.5 hours	Activity	Materials/Notes
20 minutes	<p>Materials and Workshop Items</p> <ul style="list-style-type: none"> ▶ Review workshop agenda with participants. ▶ Review materials and conduct a final tech check, if hosting virtually. ▶ Identify and post group agreements. <ul style="list-style-type: none"> > Be sure to include these if they are not mentioned: <ul style="list-style-type: none"> ➤ All voices are heard ➤ Engage as equals ➤ Test your assumptions and assume good intentions ➤ Know your intent, own your impact ▶ Discuss “garden/parking lot” and “plus/delta.” <ul style="list-style-type: none"> > Garden — “where good ideas go to grow.” > Plus/Delta — <ul style="list-style-type: none"> ➤ Plus: What went well today? (Include things that facilitators should continue doing during this and future remote workshops). ➤ Delta: What could be improved? (Include things that facilitators should continue doing during this and future remote workshops). > <i>Virtual Consideration: provide link to shared document so folks can add their own garden items but also know that we will be tracking these throughout the workshop.</i> > <i>Virtual Consideration: Consider use of a Microsoft Form that is anonymous for Plus/Delta questions.</i> 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Workbook ▶ Intro PowerPoint ▶ “garden”



2.2B Who Are We? Identifying the Mission (2 hours)

Definition: Mission – The statement that captures the overall purpose of the park/ organization and has three components:

1. why the park/unit exists
2. who it serves
3. the benefits

Session intent: Lead a straightforward discussion that results in staff coalescing around a succinct definition of what they do.

Result: Written mission statement for the park/unit that resonates with the majority of participants, posted for use during rest of workshop.

Session: Mission (In Person)

Time 2 hours	Activity	Materials/Notes
30 minutes	<p>Introduction</p> <ul style="list-style-type: none"> ▶ Discuss definition of mission. ▶ Exercise 1: Review examples in workbook. <ul style="list-style-type: none"> > Which ones do you like and why? > Test statements against best practices: “Do the example mission statements meet these three requirements/definition?” 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Workbook ▶ Flip chart (optional)
15 minutes	<p>Draft Mission</p> <ul style="list-style-type: none"> ▶ Exercise 1: (large group): Review previous mission statements for park/unit provided along with the participant guide (such as the purpose statement from foundation document). <ul style="list-style-type: none"> > Identify things we like about the drafts – note on large group flip chart or whiteboard. > Identify areas for improvement or key topics that are missing; consider noting these on flip chart to refer back to in Exercise 3. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Workbook ▶ Previous missions ▶ Flip chart
30 minutes	<ul style="list-style-type: none"> ▶ Exercise 2: (small group): Break into small groups to develop draft mission statements. <ul style="list-style-type: none"> > Individually note ideas for mission statement in workbook. > Work as small group to draft mission statement and note on flip chart. > Report out to large group. > Suggest no more than three small groups or no more than six people in a group. If you have a larger group, for mission consider larger small groups. Merging more the statements from each small group can be challenging when you have more than three. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Flip chart ▶ Workbook

Session: Mission (In Person) *continued*

Time 2 hours	Activity	Materials/Notes
30 minutes	<ul style="list-style-type: none"> ▶ Exercise 3 (large group): <ul style="list-style-type: none"> > Identify one mission to carry forward. > Note the things we like about the mission statements not moving forward. This can be done by highlighting/underlining on a flip chart the things we like in each mission statement and then moving forward with the one that has the most underlines. Using a different marker, consider also highlighting/underlining what we want to make sure is not lost in the other drafts. Or, identify using a dot voting exercise where each participant selects one to mission statement to carry forward. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Flip chart ▶ Dots for voting
15 minutes	<p>Wrap Up</p> <ul style="list-style-type: none"> ▶ Does our draft meet best practices? <ul style="list-style-type: none"> > Does the mission help you to decide what activities to not pursue, to eliminate from consideration? > Can you envision this mission being as valid 100 years from now as it is today? > When telling your loved ones what you do for a living, would you feel proud in describing your work in terms of this mission? ▶ Identify working group to refine the mission statement. 	

Session: Mission (Virtual Consideration)

Time 1–2 hours	Activity	Materials
1–2 hours	<ul style="list-style-type: none">▶ Exercise 1:<ul style="list-style-type: none">> Using a virtual whiteboard, have participants add into the shared word document things they like about their previous mission statements. Could also use chat for participants to send in feedback or a quick Microsoft Forms short answer.> Discuss changes the full group identified, and see if there is consensus for any of the changes.▶ Exercise 2:<ul style="list-style-type: none">> Break into small groups to refine the mission statement.> Consider using team channels.▶ Exercise 3:<ul style="list-style-type: none">> Large group, reconvene, report out, and select a mission with which to move forward.> Identify champion to make changes. Consider a shared PowerPoint deck and use of a single slide to which everyone has access where they can identify a shape for the remainder of the workshop and use the shape to vote on their favorite. Or, simply provide a number of circles, aka virtual dots, and have workshop participants add their initials and move the dots to their mission statement to vote.▶ Wrap Up (large group)<ul style="list-style-type: none">> Does our draft meet best practices?> Identify working group to refine the mission statement.	Materials: <ul style="list-style-type: none">▶ Virtual flip chart

2.2C Where Do We Want to Be? Developing Our Vision (2 hours)

Definition: Vision – The vivid description of the park/unit at a future point in time; what the organization will become. It is concise, inspiring, and aspirational and may not be 100% achievable. A vision should be relevant for 5 to 20 years.

Session Intent: Lead participants through exercises that are fun and that challenge them to think creatively about the future of their organization. Push them to think outside the box.

Result: A draft vision statement that resonates with participants that will be posted throughout the workshop. A tag line may also be developed that is posted.



Session: Vision (In Person)		
Time 2 hours	Activity	Materials/Notes
15 minutes	<p>Introduction</p> <ul style="list-style-type: none"> ▶ Discuss definition of vision. ▶ Ask participants if they serve on a board, with a group, or have interacted with a memorable vision? ▶ Agree on timeframe for the vision; how long should this be relevant? ▶ Review examples in workbook <ul style="list-style-type: none"> > Which ones do you like and why? > Write things we like on flip chart. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Workbook ▶ Flip chart
15 minutes	<ul style="list-style-type: none"> ▶ Exercise 1: (Individual) <ul style="list-style-type: none"> > Review headlines from the SWOC survey handout. > Share any epiphanies as a large group. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ SWOC survey handout
15 minutes	<ul style="list-style-type: none"> ▶ Exercise 2: Visual Explorer (Individual and then small or large group) <ul style="list-style-type: none"> > Each person will select one card that represents an ideal future for the park/unit. > Break into small groups or share as large depending on group size. > If done in small groups, share with entire group. Each person shares what they selected and why. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Visual explorer cards

Session: Vision (In Person) *continued*

Time 2 hours	Activity	Materials/Notes
30 minutes	<ul style="list-style-type: none"> ▶ Exercise 3: Craft a Vision (small groups, then large group) <ul style="list-style-type: none"> > Divide into small groups. Work together to craft a one- to two-sentence vision statement. > Write it on a piece of flip chart paper. Present your statement to the whole group. > Have each group read their vision statement and post it. Participants note highlights of the statements. > All discuss key elements of the various statements to carry forward into one statement. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Flip chart paper <p>Notes:</p> <ul style="list-style-type: none"> ▶ Suggest no more than six people in a group; similar to mission exercise, aim to have no more than three groups as merging three small group statements can be challenging.
45 minutes	<ul style="list-style-type: none"> ▶ Exercise 4: Large Group Discussion - Craft a Vision <ul style="list-style-type: none"> > Option 1: Underline what we like about each vision statement. <ul style="list-style-type: none"> ➤ Determine if there is one statement that has good bones. ➤ Integrate elements from other vision statements into the working version. > Option 2: <ul style="list-style-type: none"> ➤ Let participants vote using dots (1 dot each) – place a dot next to the statements we should move forward with (i.e., baseline). ➤ Take the statement with the most votes – use this as the statement with which to move forward. ➤ What do we like about the vision statements we are not moving forward? What specific language do you recommend to address that? > Is there anything big missing? Remind participants to focus on substance, not style. > Final question – Does this meet the best practices criteria? > Write draft vision statement on flip chart and post for the remainder of the workshop. > Optional – Introduce the idea of a tag line for the park/unit, relates to the vision and mission. This can be a fun exercise that builds community and energy. > Identify working group to refine the vision statement. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Flip chart paper ▶ Dots ▶ Best Practice criteria in workbook <p>Notes:</p> <ul style="list-style-type: none"> ▶ Sometimes the tag line emerges during the vision discussion exercises. If that happens, be sure to acknowledge and capture it.

Session: Vision (Virtual Consideration)

Time 2 hours	Activity	Materials/Notes
2 hours	<ul style="list-style-type: none"> ▶ Exercise 2: Participants could select a photo from online; use curated folder of photos from which participants can pick. ▶ Exercises 1, 3, and 4: Use multiple teams meetings to support break out groups. Have everyone work in the same shared workspace or provide a different working document for each group. Consider using memorable wildlife species or plants for group names and have the meeting rooms match the names, this way folks can see their name next to the "bobcat" and click on the link to take them to the "bobcat" room. 	
	<p>Wrap Up</p> <ul style="list-style-type: none"> ▶ Questions to consider when drafting a vision statement <ul style="list-style-type: none"> > Do you find the vision exciting? > Is the vision clear, compelling, and easy to grasp? > Does this vision connect to the mission? > Will this vision be exciting to a broad base of people in the organization, not just those with executive responsibility? > Do you believe the organization has less than a 100% chance of achieving the vision (50% to 70% is ideal) yet believe the organization can achieve the vision if fully committed? The vision is not intended to be 100% achievable. > Will achieving the vision require a quantum step in the capabilities and characteristics of the organization? 	



2.2D What Guides Us? Revisiting Our Core Values (1.5–2 hours)

Definition: Core Values – Are what the organization recognizes and rewards—strongly held beliefs that are freely chosen, publicly affirmed, and acted upon with consistency.

Session Intent: Lead the participants through exercises that challenge them to think through the desired/lived core values for the organization that align with what they hold most important regardless of the setting or situation.

Result: Draft list of five to seven agreed upon core values for the organization, including definitions for each core value.



Session: Core Values (In Person)

Time 1.5 to 2 hours	Activity	Materials/Notes
20 to 30 minutes	<p>Introduction</p> <ul style="list-style-type: none"> ▶ Define Core Values. ▶ Revisit DOI and draft NPS Core Values. ▶ Discuss what core values mean to you and your work—include chart in presentation that shows role of strategy and culture in an organization (Culture eats strategy for breakfast). ▶ Introduce operationalization of core values, how to make them real, and how are they used and communicated in the organization. <ul style="list-style-type: none"> > <i>“Living into our values means that we do more than profess our values, we practice them. We walk our talk—we are clear about what we believe and hold important, and we take care that our intentions, words, thoughts, and behaviors align with those beliefs.” Brené Brown</i> 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ List of DOI and draft NPS core values in workbook ▶ Strategy and Culture chart in workbook ▶ Flip chart paper

Session: Core Values (In Person) *continued*

Time 1.5 to 2 hours	Activity	Materials/Notes
10 minutes	<ul style="list-style-type: none"> ▶ Exercise 1: <ul style="list-style-type: none"> > Review list of core values (appendix C). > Ask participants to reflect on the two core values they selected in the survey. > Ask yourself: <ul style="list-style-type: none"> ➤ Does this define me? ➤ Is this who I am at my best? ➤ Is this a filter that I use to make hard decisions? ➤ Think through “one way the team could support the core values.” > <i>Virtual consideration: consider leveraging chat, short answer Microsoft Forms, or shared word document.</i> 	
30 minutes	<ul style="list-style-type: none"> ▶ Exercise 2: Move from individual to park/unit core values <ul style="list-style-type: none"> > Consider same small groups from mission/vision. > Have each small group review survey results and identify three to five values that they recommend for the park/unit, with notes that describe core value. > Write one core value per sticky note. > Small groups present each of their core values to the large group. > Representatives from each small group come to the front and share their core values round robin style. Facilitator groups the values on chart paper (using the Post-its) as the large group directs. When there is disagreement, the small group that wrote the value decides where to place it (in a new group or an existing one). > The result is a grouped set of draft core values for the park/unit. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Handout with the top 10 values identified from Core Values survey, along with compiled responses to what values mean ▶ Large sticky notes ▶ Flip chart ▶ Markers for each table/group

Session: Core Values (In Person) *continued*

Time 1.5 to 2 hours	Activity	Materials/Notes
30 minutes	<p>▶ Exercise 3: Large group discussion</p> <ul style="list-style-type: none"> > Large group discusses the set of core values created above with the goal of selecting five to seven values for the park/unit. If there are seven or fewer, confirm that this is the set that the park/unit wants, then go to the questions below. If there are more than seven, lead discussion to narrow down the list. You may want to make the final decision on the values that will be selected until after the discussion about the questions is complete. > As you ask the group to consider the questions below, capture on chart paper only those comments that the group agrees need to be preserved. Most of this discussion will not need to be captured. It is important that there is general agreement on the responses to each question. > Would you want your organization to continue to stand for this core value 100 years into the future, no matter what changes occur in the outside world? > Do you believe that those who do not share this core value—those who breach it consistently—do not belong in your organization? <ul style="list-style-type: none"> ➤ Would you change jobs before giving up this core value? ➤ Would you know and care if this core value was not followed? ➤ Are there examples of and stories about this core value at work? > Refine list to five to seven core values. Consider using the recommendation roll up technique (described in key actions) or dot voting if needed to pare down the list. > Ask participants how the core values might be communicated throughout the organization. (Posters, wallet cards, etc.) 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Chart paper with grouped core values created from Exercise 2

Session: Core Values (In Person) *continued*

Time 1.5 to 2 hours	Activity	Materials/Notes
20 minutes	<ul style="list-style-type: none">▶ Exercise 4: Finalize core values<ul style="list-style-type: none">> If there is time, consider doing this in the workshop. More likely it will be done by a follow-up team. The goal of the exercise is to add specificity to the core values based on the large group discussion.> If it is done during the workshop, break into small groups – one group for each core value. Ask and record the answers to these questions:<ul style="list-style-type: none">≥ What does this core value mean to us? Define each core value in a sentence or two.≥ What is an example of when you are fully living into this value?	<p>Materials:</p> <ul style="list-style-type: none">▶ Paper on which to capture each core value with definition and examples



DAY 2

2.2E Where are We Now? Finding Our Pivotal Issues (1.5 hours)

Definition: Pivotal Issues – The biggest issues the park/unit faces. Pivotal issues can substantially improve or worsen conditions in the park/unit—they are often framed as strengths, weaknesses, opportunities, or challenges.

Session intent: Surface issues that came up in the SWOC survey in a collaborative (non-accusatory) way. Avoid rehashing old issues or specific missteps. Begin to frame issues as problems that park/unit wants to solve.

Desired result: Record between three and seven clearly-articulated, cross-cutting pivotal issues that NPSNext strategic plan could help the park/unit to focus on solving to best achieve their mission and vision.

Session: Pivotal Issues (In Person)

Time 1.5 hours	Activity	Materials/Notes
15 minutes	<p>Introduction</p> <ul style="list-style-type: none"> ▶ Give KUDOS for their great work and effort to initiate a strategic plan. ▶ Explain the sphere of influence, and set expectations for issue resolution. ▶ Discuss what strategic plans can and cannot address (e.g., funding, staffing, etc.). 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Workbook image of sphere of influence, emphasize area where they can solve problems ▶ Draw chart with “Can solve” “Can’t solve” labels for strategic planning
30 minutes	<ul style="list-style-type: none"> ▶ Exercise 1: Individual review then large group discussion <ul style="list-style-type: none"> > Review SWOC summary individually. <ul style="list-style-type: none"> ➤ SW (internal) and OC (external). > Review SWOC Summary handout together <ul style="list-style-type: none"> ➤ Prompts: Are these reflective of pivotal issues? ➤ Help to highlight themes for the group that may speak to the park/unit’s pivotal issues (between three and five issues). 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ SWOC summary handout – provided in advance and as a handout or attachment ▶ Recent FEVS scores (two previous years) for unit

Session: Pivotal Issues (In Person) *continued*

Time 1.5 hours	Activity	Materials/Notes
45 minutes	<ul style="list-style-type: none">▶ Exercise 2: individual, small, and large group<ul style="list-style-type: none">> Work individually through pivotal issue worksheet (appendix D).> Ask participants to self-select into issue that most resonates with them; suggest pairs or triads; or small table discussions.> Share key takeaways from worksheet with large group; identify overlap:<ul style="list-style-type: none">➤ identify the pivotal issues that the strategic plan could address; could also indicate potential emphasis areas.> Connect to emphasis area development through Question 4 from worksheet: If this issue were addressed, what could be the outcome?<ul style="list-style-type: none">➤ What areas should we focus our efforts in to address this issue? Consider flip charting any overlap or potential emphasis areas.> Virtual option: Share screen in small group to see how partner filled out worksheet.	<p>Materials:</p> <ul style="list-style-type: none">▶ Worksheet in appendix D▶ Timer for quiet time to work individually on worksheet▶ Flip chart or virtual whiteboard



2.2F What will Success Look Like? Choosing Emphasis Areas (1 hour)

Definition: Emphasis Areas – Broad, longer-term priorities that focus an organization’s time, effort, and financial resources to accomplish the mission and move the organization towards its vision.

Session intent: Lead participants in exercises to group the park/unit efforts to solve problems into big buckets. These should align with the mission, support achievement of vision, support the operationalization of core values, and resolve key issues.

Desired result: Identify between three and five emphasis areas that will inform the development of outcomes and subsequent key actions. Ideally, they should be limited to no more than five key areas and should be cross-cutting; i.e., not specific to only one division.

Session: Emphasis Area (In Person)

Time 1 hour	Activity	Materials/Notes
15 minutes	<p>Introduce Emphasis Areas – Large group</p> <ul style="list-style-type: none"> ▶ Explain what an emphasis area is. ▶ Show examples in workbook. <ul style="list-style-type: none"> > WASONext Emphasis Areas. ▶ Identify the areas for this unit’s emphasis areas based on mission, vision, core values, and key issues identified during Day 1 and 2. ▶ Any light bulbs from SWOC summary or discussion of issues? Consider resolving weaknesses or challenges, leveraging strengths, advancing opportunities. ▶ Consider showing the balanced scorecard model: Balanced Scorecard approach to goal development. The idea is that there should be at least one goal that addresses each of the four areas: <ul style="list-style-type: none"> > Employee Satisfaction, Growth and Learning > Operations > Financial > Customer Satisfaction 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Participant workbook and Ppt with: ▶ Balanced Scorecard content ▶ List of WASONext emphasis areas

Session: Emphasis Area (In Person) *continued*

Time 1 hour	Activity	Materials/Notes
45 minutes	<p>Emphasis Area Exercise – individual, then small group:</p> <ul style="list-style-type: none"> ▶ Reflect on what emphasis areas the park should focus their efforts to move the needle on achieving the vision, resolving key issues, or operationalizing core values. Encourage participants to reflect back on answers for question 4 of the SWOC worksheet. ▶ Report out from small groups to large group. <ul style="list-style-type: none"> > Record on flip chart or whiteboard. > Identify overlap. > Ask if each Division/Branch can contribute to each emphasis area. ▶ Discuss of the remaining emphasis areas identified which are most likely to advance the vision, resolve issues. ▶ Check that draft emphasis areas cover the four areas of the balanced scorecard and, for any that are close, consider using wording from WASONext. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Sticky notes to record individual work, then combine in small groups ▶ Flip chart or whiteboard to capture report out to large group <p>Notes:</p> <ul style="list-style-type: none"> ▶ Start w/ individual reflection (5 minutes) ▶ Then discuss and combine in small groups (10 min) ▶ Each small group brings no more than six emphasis areas back to the large group to be shared and consolidated. (30 min)
15 minutes	<p>Wrap Up</p> <ul style="list-style-type: none"> ▶ Capture draft emphasis areas and display during remainder of the workshop. 	



2.2G What Will Success Look Like? Defining Desired Outcomes (2–3 hours)

Definition: Outcomes – Define how the emphasis areas will be addressed, what the park will work toward over the next three to five years. They will define what progress toward achievement of the emphasis areas looks like.

Session intent: Ensure workshop participants have some self-reflection time or small group work to dig into what outcomes will look like if they focus time and energy towards an emphasis area.

Result: Identify between two and seven outcomes for each emphasis area that will inform the development of key actions. The outcomes will not cover all of the work being done by the organization, they are intended to be steps to move toward the vision, not capture all of the “everyday” work. That said, there should be something that every employee can see themselves in. They should give employees purpose.

Session: Outcomes (In Person)

Time 2–3 hours	Activity	Materials/Notes
15 minutes	Introduce Outcomes <ul style="list-style-type: none"> ▶ Definition. ▶ Multiple outcomes per emphasis area. ▶ Will note who is responsible. ▶ Key actions tier off outcomes. 	Materials: <ul style="list-style-type: none"> ▶ Workbook

Session: Outcomes (In Person) *continued*

Time 2–3 hours	Activity	Materials/Notes
1–2.5 hours (depending on rotations)	<p>Outcomes Exercise</p> <p>(Discuss as a large group the value of cross-cutting emphasis areas to inform the development of different but related outcomes.)</p> <ul style="list-style-type: none"> ▶ Option 1: (small group ~30 minutes) <ul style="list-style-type: none"> > Organize participants into small groups based on emphasis areas. <ul style="list-style-type: none"> ⇒ Remind them of the SWOC and strategic planning core elements. ⇒ Outcomes don't have to perfectly align. SWOC keeps you grounded. > Ask participants to identify measurable outcome(s) for the one emphasis area on which their small group is focused. > Each group will write their outcome(s) on a piece of flip chart paper, with a title. > Each group presents their outcome(s) to the large group. > Every person writes on a sticky during outcome presentation comments, edits, thoughts and place those on the outcome for the small group to take into consideration (1 idea per sticky) <ul style="list-style-type: none"> ⇒ Sideboards for comments/edits: remind participants what a useful productive comment is—if you are taking the outcome in a totally different direction please voice that because that might be an outcome that is lacking. ⇒ Reminder before they break back into small groups that they need to consider the feedback. ⇒ Consider rotating groups to work on other outcomes to prevent ownership of outcomes. > Rotate groups or have groups resolve edits received (another 30 minutes): <ul style="list-style-type: none"> ⇒ Option 1: World Café – Have groups rotate and review outcomes and resolve stickies. ⇒ Option 2: Keep small groups with the same emphasis area to refine after receiving feedback. Resolve stickies or feedback received. > Small groups report out on feedback received and how they addressed comments or why they did not address stickies. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ SWOC survey ▶ Stickies or half sheets of paper ▶ Tables for small group work

Session: Outcomes (In Person) *continued*

Time 2–3 hours	Activity	Materials/Notes
	<p>Outcomes Exercise (continued)</p> <ul style="list-style-type: none"> > If time is available, consider allowing silent studio walk, so everyone can review and provide additional input on outcomes. ▶ Option 2: (small group rotate through world café from the beginning, this option likely takes less time but leaves more unrefined outcomes) <ul style="list-style-type: none"> > Have each emphasis area on a piece of chart paper around the room. > Small groups rotate (World Café) from one to the next until they have been to all. At each, they write down their ideas for Outcomes after reading what is already there. Check those that they agree with, add their own, or provide comments/suggestions to other stickies to improve. > At the end, large group reviews, comments briefly. There will likely be a combination of Outcomes and Key Actions. > Note: If doing this approach be sure to separate outcomes and key actions for the next exercise. 	
	<p>Wrap-Up</p> <ul style="list-style-type: none"> ▶ Similar to other sessions, ensure there are identified champions for refining the outcomes. Key actions will tier from the outcomes. 	

Session: Outcomes (Virtual Consideration)

Time 2–3 hours	Activity	Materials
2–3 hours	<p>Virtual Consideration</p> <ul style="list-style-type: none"> ▶ Use teams channels by emphasis area to give small groups time to draft outcomes. Encourage them to do self-reflection first and then talk as a small group. Enter their outcomes into a shared working document to present (share screen) to the larger group. ▶ Rejoin as a large, have small group reporters share screen or drop the link to their shared document in the chat. Report out. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ SWOC ▶ Teams Channels ▶ SharePoint documents for each emphasis area

DAY 3

2.2H How do We Get There? Brainstorming Key Actions (2–4 hours)

Definition: Key Actions – Represent measurable, on-the-ground activities that drive progress toward outcomes and may take one or more years to accomplish. Key Actions will be used to develop the park’s annual work plan and will be reviewed and updated annually. Key Actions will roll down into Employee Performance Appraisal Plans.

Session intent: Lead a discussion that allows space for workshop participants to brainstorm key actions to implement the outcomes identified in the previous session.

Result: List of key actions that move the needle on progress towards outcomes and are strategic in nature, not a list of everything the park/unit is already doing. An identified group of workshop participants that can refine the list of key actions. A strategy should be identified to involve any park/unit employees who could not participant in the planning workshop.



Session: Key Actions (In Person)		
Time: 2–4 hours	Activity	Materials/Notes
30 minutes	<p>Review NPSNext Core Elements</p> <ul style="list-style-type: none">▶ Review NPSNext Core Elements you have already crafted for Mission, Vision, Core Values, Emphasis Areas, and Outcomes. Consider providing this in a handout.<ul style="list-style-type: none">> Any changes needed?> Interdisciplinary teams self-select to refine outcomes or other elements, if needed.	<p>Materials:</p> <ul style="list-style-type: none">▶ NPSNext Core Elements Handout
15 minutes	<p>Introduction</p> <ul style="list-style-type: none">▶ Exercise 1: (large group ~15 minutes): Develop Criteria.<ul style="list-style-type: none">> List what makes a good key action on a flip chart – large group agreement on key action (e.g., timeline, process, sequence, funding, champion, addresses key issue, SMART, etc.).	<p>Materials:</p> <ul style="list-style-type: none">▶ Flip Chart
30 minutes	<p>Key Action Exercise</p> <ul style="list-style-type: none">▶ Exercise 2: (large group): Practice identifying key actions for one outcome.<ul style="list-style-type: none">> Option for approach:<ul style="list-style-type: none">➤ Consider round robin where each person says: “new key action, ditto, or pass.”➤ Individual reflection and read aloud stickies.	<p>Materials:</p> <ul style="list-style-type: none">▶ Stickies

Session: Key Actions (In Person) *continued*

Time: 2–4 hours	Activity	Materials/Notes
1–3 hours	<p>Key Action Exercise</p> <ul style="list-style-type: none"> ▶ Exercise 3: (individual or small group): Develop key actions for different outcomes. <ul style="list-style-type: none"> > Option 1: One Emphasis Area at a time (Individual and Small Group—each round 15 minutes—more opportunity to refine key actions): <ul style="list-style-type: none"> ⇒ Assign each table an outcome. Consider doing all outcomes for an emphasis area for a round. Then multiple rounds to work through all emphasis area outcomes. ⇒ First individually, think through the assigned outcome area, reflect how this outcome could be accomplished. What key actions would move the needle? ⇒ Share actions you developed with those at your table. ⇒ Return to large group discussion. Repeat. > Option 2: World Café Option for All Emphasis Areas at Once (10–15 minutes per rotation): <ul style="list-style-type: none"> ⇒ NOTE: if you did Option 2: Exercise 1 above for Outcomes, be sure to split out outcomes and key actions before continuing the key actions discussion. ⇒ Organize participants into small groups based on emphasis areas. (initial group based on interest; no more than six per group, if possible). ⇒ Each group brainstorms key actions to achieve all the outcomes within that emphasis area. Write the key actions on sticky notes, one action per sticky note. Place on flip chart. ⇒ Optional: At the beginning of the next rotation, the table host who stays with the emphasis area will brief the new group members on ideas already generated and group members will modify the existing key actions and/or add new ones. Write one key action per on sticky note. ⇒ Small groups return to where they started and report out on what was developed. ⇒ Caution participants not to get wrapped up in the details; refine in the future. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Workbook ▶ Flip charts <p>Considerations:</p> <ul style="list-style-type: none"> ▶ Follow-up questions: Who could accomplish it? Are there opportunities for synergy, to pool resources, or engage in complementary efforts? ▶ In appendix E are some additional exercises for refining and prioritizing key actions. Consider these if there is workshop time available or offer to the champions of key actions.

Session: Key Actions (In Person) *continued*

Time: 2–4 hours	Activity	Materials/Notes
	<ul style="list-style-type: none"> ▶ Exercise 4: Potential Close-out of Key Actions <ul style="list-style-type: none"> > Review Best Practices and criteria developed in Exercise 1 of Key Actions session. Did we stick to our group agreements for key actions? > What do next steps look like? > Who is championing which emphasis area, outcome, and key actions. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Criteria developed in Exercise 1 Flip Chart

Session: Key Actions (Virtual Consideration)

Time 2–4 hours	Activity	Materials/Notes
2–4 hours	<p>Virtual Consideration</p> <ul style="list-style-type: none"> ▶ Review NPSNext Core Elements (see above). ▶ Key Action Criteria Development: <ul style="list-style-type: none"> > Using chat or shared document list criteria and share screen for folks to refine before key action development. <p>Key Action Exercises</p> <ul style="list-style-type: none"> ▶ Exercise 2: (large group): Practice as large group identifying key actions for one outcome. ▶ Exercise 3: Options: <ul style="list-style-type: none"> > Option 1: Forms <ul style="list-style-type: none"> ⇒ Use Microsoft Forms to collect key actions for each outcome. ⇒ Have small groups sort through the actions brainstormed and refine the list. ⇒ Report back to large group. > Option 2: Shared Document <ul style="list-style-type: none"> ⇒ Using teams channels, have small groups meet and develop key actions in shared word document. ⇒ Groups could self-select or be assigned depending on pre workshop topics. Pre-assigning groups may reduce time during transition from large to small group work. ⇒ Report back to large group. <p>Wrap up</p> <ul style="list-style-type: none"> ▶ Depending on time, consider individual self-reflection. ▶ Opportunity using Microsoft Forms or shared document to sign up for specific outcomes. 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ NPSNext Core Elements Shared Word Document ▶ Virtual Flip Chart/shared document ▶ Option 1: Microsoft Form ▶ Option 2: Shared Word Document ▶ Shared Document with Key Action Criteria



2.2I How do We Track Progress? Committing to Implementation (1–3 hours)

Definition: Plan Implementation – A clear procedure for enacting the plan’s emphasis areas, outcomes, and key actions, as well as monitoring and updating the plan.

Session intent: Lead a discussion that involves all participants and leads to an understanding of the importance of plan implementation and monitoring, including a plan to do so.

Result: Outline draft process and framework for implementing strategic plan, tracking progress, and updating plan.

Session: Plan Implementation (In Person)

Time 2–3 hours	Activity	Materials/Notes
10 minutes	<p>Introduction</p> <ul style="list-style-type: none"> ▶ If there is not a plan for implementation it is likely that the plan will sit on the shelf and not be used. There is no strategy without execution and there is no execution without commitment. ▶ Briefly discuss the best practices for implementation. <ul style="list-style-type: none"> > It generally takes one to two years for an organization to get into the swing of managing based on strategic planning. > Strategic Plans need to be reviewed at least annually and updated to reflect changes that have occurred. > Every employee should be able to see themselves in the plan and have at least one strategic plan key action in their EPAP. > Someone should have ultimate responsibility for the plan and its’ implementation. 	

Session: Plan Implementation (In Person) *continued*

Time 2–3 hours	Activity	Materials/Notes
45 to 75 minutes	<ul style="list-style-type: none"> ▶ Discuss and create implementation process for strategic plan: <ul style="list-style-type: none"> > Identify champions for each outcome, saying no to “somebody should,” if not already done in previous discussions. > Ask questions below, let group discuss each question while you capture decisions on chart paper. > For every decided action, assign the person(s) responsible for making sure that the action occurs and the dates for each. In other words, who is going to do what by when. ▶ Questions: <ul style="list-style-type: none"> > Who drives completion and follow-through? <ul style="list-style-type: none"> ⇒ Who will be part of the core team to complete and monitor the plan? ⇒ Who is responsible for updating the written plan? ⇒ Who is the lead for the strategic plan? > How will further staff engagement and communication be handled? <ul style="list-style-type: none"> ⇒ If all employees have not been involved in the planning process, how will you capture their suggestions and comments, get their buy-in? It will be particularly important to get the input of all employees on the key actions. ⇒ What will be communicated to all employees following this workshop about what occurred during the workshop and what the plan is for involving them? ⇒ Who will be responsible for communicating the plan to all employees, and how often will they get those communications? > How will we ensure accountability? <ul style="list-style-type: none"> ⇒ How often should we meet to review the plan and our progress and adjust as needed (i.e., quarterly, biannually)? ⇒ Who should be part of the review process? ⇒ What kind of reporting and information collection should be done before each meeting? ⇒ What is the process to incorporate key actions into annual work plans? > How will Key Actions be reflected in Employee Performance Appraisal Plans? 	<p>Materials:</p> <ul style="list-style-type: none"> ▶ Flip chart paper

Session: Plan Implementation (In Person) *continued*

Time 2–3 hours	Activity	Materials/Notes
	<ul style="list-style-type: none"> ▶ Questions (continued): <ul style="list-style-type: none"> > How will we acknowledge and celebrate our successes? Note, it is important to celebrate successes! Don't skip this part of the discussion. 	
	<p><i>Option: This is something to suggest and discuss but not attempt during the workshop. It would be a follow-up activity if the park/unit decides to implement.</i></p> <ul style="list-style-type: none"> ▶ One way to monitor progress on outcomes and key actions is to identify Federal Employee Viewpoint Survey (FEVS) questions that are appropriate for monitoring progress. ▶ Below is an example of how this might be done. ▶ Here is an example of one way to use FEVS questions to monitor progress on an outcome or a key action: <ul style="list-style-type: none"> > These Employee Viewpoint Survey Questions: <ul style="list-style-type: none"> ⇒ 1. I am given a real opportunity to improve my skills in my organization. ⇒ 18. My training needs are assessed. ⇒ 26. Employees in my work unit share job knowledge with each other. ⇒ 27. The skill level in my work unit has improved in the last year. ⇒ 29. The workforce has the job-relevant knowledge and skills necessary to accomplish organizational goals. ⇒ 47. Supervisors in my work unit support employee development. ⇒ 68. How satisfied are you with the training you receive for your present job? <p>Example</p> <ul style="list-style-type: none"> ▶ Connect to Outcome 6: We have the training, work experience, and tools to succeed in our jobs. ▶ Through these Key Actions... <ul style="list-style-type: none"> > Key Action: All permanent and term employees are trained to create meaningful Individual Development Plans (IDPs) that are implemented and reviewed annually as part of performance reviews. (All Supervisors) > Key Action: Identify common employee developmental needs and provide training. (Leadership Advisory Council/Chief of Business and Administration) 	<p>Most of this information should be in the workbook so that the park/unit can follow up if they choose to do so.</p>

Session: Plan Implementation (In Person) *continued*

Time 2–3 hours	Activity	Materials/Notes
1 to 1.5 hours	<ul style="list-style-type: none"> ▶ Optional: Reality Check <ul style="list-style-type: none"> > This is a good practice if there is time. If not done in the workshop, it can be suggested as a follow-up exercise. ▶ Introduce Reality Check <ul style="list-style-type: none"> > Reflect on purpose of NPSNext Strategic Plan Initiative. > Reminder on sphere of influence. ▶ Exercise 1 (large group discussion): <ul style="list-style-type: none"> > Is the overall list of outcomes and key actions reasonable? > Do you have the time, resources, and staff to implement the strategic plan, specifically begin work on the key actions? > The prioritized key actions you have come up with will have consequences for the work you do. Any reflections at this time? ▶ Exercise 2 (individual reflection): <ul style="list-style-type: none"> > All individuals take 10 minutes and write down one thing they could place less emphasis on, do more efficiently, or stop doing all together. > Could be that the activity does not relate to the identified outcomes and key actions – then do you really need to do it? We are trying to create bandwidth for the strategic tasks. > Individually think about the park/unit. What roles are better served by another division? What portions of your work might be more efficiently or effectively done by another division? (i.e., how to work effectively together / divvy up responsibilities to best suited partner.) > Think about ways to reapportion a particular task among partners. > Note if important work would slow down or stop because of the change in priorities. CANNOT JUST HAND THE TASK TO SOMEONE ELSE – it goes away! Do not recommend what other people should not do, just what you will not do. > In small groups, review suggestions of what you can stop doing. > Discuss. Consolidate the suggestions and return to large group to share. 	Flip chart

Session: Plan Implementation (In Person) *continued*

Time 2–3 hours	Activity	Materials/Notes
1 hour	<ul style="list-style-type: none"> ▶ Reality Check – another approach <ul style="list-style-type: none"> > Exercise 1: individual reflection and large group discussion <ul style="list-style-type: none"> ⇒ Each participant takes at least one key action and runs it through the key action worksheet (appendix E). ⇒ Individuals report out on action worksheets for discussion with large group. ⇒ Look at the different action worksheets, any observations? > Exercise 2: Large Group Discussion <ul style="list-style-type: none"> ⇒ Did working through the worksheets result in any epiphanies? ⇒ How are we doing? Is the lift too heavy? Are the actions appropriate? ⇒ Can you reasonably accomplish all tasks given timeframe and staffing? ⇒ Are there opportunities to generalize the implementation process? ⇒ What if any are the unanswered big questions? ⇒ Where do decisions need to be made? ⇒ What has already been discussed or decided that can weigh in on this action and influence our decision making? ⇒ Similarities/differences between processes? ⇒ Observations? 	<p>Materials</p> <ul style="list-style-type: none"> ▶ Copies of Key Action Worksheet ▶ Flip charts

APPENDIXES

Appendix A: NPSNext Strategic Plan Glossary

Strategic Plan – Answers the questions where we are now, where do we want to be in the near future (typically three to five years), what are the most important things we need to accomplish to get there, and how will we review our progress.

Mission – The statement that captures the overall purpose of the park/organization and has three components:

1. why the park/unit exists
2. who it serves
3. the benefits

Vision – The vivid description of the park/unit at a future point in time, what the organization will become. It is concise, inspiring, and aspirational and may not be 100% achievable. Vision should be relevant for 5–20 years.

Core Values – What the organization recognizes and rewards—strongly held beliefs that are freely chosen, publicly affirmed, and acted upon with consistency

Pivotal Issues – The biggest issues the park/unit faces. Pivotal issues can substantially improve or worsen conditions in the park/unit—they are often framed as strengths, weaknesses, opportunities, or challenges.

Emphasis Areas – Broad, longer-term priorities that focus an organization’s time, effort, and financial resources to accomplish the mission and move the organization towards its vision.

Outcomes – Define how the emphasis areas will be addressed, what the park will work toward over the next three to five years. They will define what progress toward achievement of the emphasis areas looks like.

Key Actions – Represent measurable, on-the-ground activities that drive progress toward outcomes and may take one or more years to accomplish. Key Actions will be used to develop the park’s annual work plan and will be reviewed and updated annually. Key Actions will roll down into Employee Performance Appraisal Plans.

Plan Implementation – A clear procedure for enacting the plan’s emphasis areas, outcomes, and key actions, as well as monitoring and updating the plan.

Appendix B: Draft SWOC Survey

Strengths, Weaknesses, Opportunities, and Challenges Survey (Microsoft Form)

Dear *[insert name]*,

We are in the early stages of preparing a strategic plan for *[Park/Unit Name]* that will articulate the park's vision and emphasis area and identify outcomes and key actions to guide work over the next three to five years. The strategic plan will help the *[Park/Unit Name]* to more effectively manage the park's resources. As part of the strategic planning process, we are gathering views and ideas that will directly inform the strategic planning process. We invite you to play a role in helping us identify the *[Park/Unit Name]'s* biggest strengths, weaknesses, opportunities, and challenges by responding to the following five questions. Please note that your feedback will remain anonymous.

1. **What is the single biggest strength of *[Park/Unit Name]* as an organization?**

In other words, what are you doing exceptionally well at *[Park/Unit Name]*? Please be specific. (For example, inter-divisional communication is superb in this unit due to a new format for management team meetings and an online operations calendar.)

2. **What is the single biggest weakness of *[Park/Unit Name]* as an organization? What's the one thing that most needs to happen to improve this weakness?**

(For example, the park lacks a strong social media presence. This could be addressed by setting up a Facebook page and also offering virtual tours of the park.)

3. **What key opportunities do you see for *[Park/Unit Name]* in the next few years?**

Opportunities are outside factors or situations that can affect the park in a favorable way. (For example, school districts are revising their local history curriculum and this is an opportunity to collaborate.)

4. **What key challenges do you see for *[Park/Unit Name]* in the next few years?**

Challenges are outside factors or situations that can affect the park in a negative way. (For example, some parks are facing major ecological threats due to urban development outside their boundaries.)

5. **Imagine it's the year 2030 and *[Park/Unit Name]* is featured on the front page of the New York Times for a highly successful initiative or accomplishment. ~What is the headline for the story?** (Note, direct responses from this question could be used during the workshop.)

Appendix C: Core Values Survey

Core values are strongly held beliefs that are freely chosen, publicly affirmed, and acted upon with consistency. They are what the organization recognizes and rewards. They express the manner in which, both individually and collectively, we pursue our work. When we are challenged in fulfilling our mission, our core values sustain us and guide us in meeting the challenge.

National Park Service core values were last identified by the National Leadership Council in 2001 through workshops conducted with employees at all levels of the National Park Service. These core values include:

- **Respect:** We embrace each other's differences so that we may enrich the well-being of everyone.
- **Integrity:** We deal honestly and fairly with the public and one another.
- **Tradition:** We are proud of it; we learn from it; we are not bound by it.
- **Excellence:** We continually strive to learn and improve so that we may achieve the highest ideals of public service.
- **Shared Stewardship:** We share a commitment to resource stewardship with the global preservation community.

As part of the NPSNext strategic planning process, each park and unit will be asked to contribute to revise our core values, to identify those values that best unite us and inspire us to best meet our mission and purpose as we enter our second century. This starts with you identifying your own values.

When I facilitate this work in organizations, I always get this question: "Do you want me to identify my professional values or personal values?" Here's the rub: we have only one set of values. We don't shift our values based on context. We are called to live in a way that is aligned with what we hold most important regardless of the setting or situation.

~ Brene Brown

1. Please select up to three values below, feel free to insert additional values you think are missing.

- | | | |
|---|--|--|
| <input type="checkbox"/> Adaptability | <input type="checkbox"/> Happiness | <input type="checkbox"/> Research |
| <input type="checkbox"/> Accountability | <input type="checkbox"/> Hope | <input type="checkbox"/> Respect |
| <input type="checkbox"/> Candor | <input type="checkbox"/> Humility | <input type="checkbox"/> Responsibility |
| <input type="checkbox"/> Collaboration | <input type="checkbox"/> Honesty | <input type="checkbox"/> Safety |
| <input type="checkbox"/> Commitment | <input type="checkbox"/> Inclusion | <input type="checkbox"/> Self-Reliance |
| <input type="checkbox"/> Community | <input type="checkbox"/> Initiative | <input type="checkbox"/> Service |
| <input type="checkbox"/> Compassion | <input type="checkbox"/> Innovation | <input type="checkbox"/> Stewardship |
| <input type="checkbox"/> Competence | <input type="checkbox"/> Integrity | <input type="checkbox"/> Sustainability |
| <input type="checkbox"/> Contemplation | <input type="checkbox"/> Leadership | <input type="checkbox"/> Teamwork |
| <input type="checkbox"/> Courage | <input type="checkbox"/> Loyalty | <input type="checkbox"/> Tolerance |
| <input type="checkbox"/> Curiosity | <input type="checkbox"/> Meaningful | <input type="checkbox"/> Tradition |
| <input type="checkbox"/> Determination | <input type="checkbox"/> Make a Difference | <input type="checkbox"/> Trustworthiness |
| <input type="checkbox"/> Diversity | <input type="checkbox"/> Non-Violence | <input type="checkbox"/> Wellbeing |
| <input type="checkbox"/> Empathy | <input type="checkbox"/> Optimism | <input type="checkbox"/> Vision |
| <input type="checkbox"/> Empowerment | <input type="checkbox"/> Partnership | <input type="checkbox"/> Other_____ |
| <input type="checkbox"/> Excellence | <input type="checkbox"/> Perseverance | <input type="checkbox"/> Other_____ |
| <input type="checkbox"/> Growth | <input type="checkbox"/> Pragmatism | <input type="checkbox"/> Other_____ |

2. For each value chosen above, please explain why you selected this value and what it means to you.

Appendix E: Key Action Worksheet

Action Worksheet

Emphasis Area:
Outcome #

Key Action:

Description, if necessary:

Desired Outcomes

No.	Process (key steps to implement)	Time frame (start date and critical finish date, if applicable)	Resources (specific people, equipment, funds, etc.)	Champion (person identified to lead or be responsible for the effort)	Measure of success (how will you evaluate the outcome?)	Major obstacles/ challenges expected
1						
2						
3						

Optional Exercise to Refine and Prioritize Key Actions

Definition: Key Actions – represent measurable, on-the-ground activities that drive progress toward outcomes and may take one or more years to accomplish. Key Actions will be used to develop the park’s annual work plan and will be reviewed and updated annually. Key Actions will roll down into Employee Performance Appraisal Plans.

Session intent: Lead a discussion that encourages critical thinking to ensure key actions are sequenced appropriately, clear, and timelines and champions are established. Action planning is critical to success of strategic plan implementation.

Result: List of key actions that are refined and prioritized to support clear understanding of roles and responsibilities as the park/unit begins to implement the strategic plan.

Optional Exercise to Refine and Prioritize Key Actions		
Time: 1–2 hours	Activity	Materials/Notes
15 minutes	<p>Refine Key Actions</p> <ul style="list-style-type: none">▶ Review draft list of key actions individually or as large group▶ Reflections before we embark on refining	<p>Materials:</p> <ul style="list-style-type: none">▶ NPSNext Strategic Plan Components▶ List of Key Actions

Optional Exercise to Refine and Prioritize Key Actions *continued*

Time: 1–2 hours	Activity	Materials/Notes
	<p>Refine Key Action Exercise</p> <ul style="list-style-type: none"> ▶ Option 1 (small group work): <ul style="list-style-type: none"> > Self-select into small groups, work on key actions by goal, refine, consider some of the topics provided above in the key actions worksheet. > Large group discuss all actions identified under each high priority strategy. ▶ Option 2 (individual reflection): <ul style="list-style-type: none"> > Individual: walk around silently to review, provide comment, note additional actions for these high priority key actions. > Repeat for remaining high priority key actions > Will need volunteers to refine the feedback received ▶ Exercise: Prioritize Key actions recommendation roll-up or dot voting (individual, small group and large group ~30-60 minutes): <ul style="list-style-type: none"> > Use individual reflection, pairs, triads and small groups to build consensus. In phases, consider merging pairs, triads, small groups, etc. until there are TWO groups at the end. Have groups discuss and agree to top five key actions along the way. ▶ Large Group Discussion: <ul style="list-style-type: none"> > Do any of these high priority key actions surprise you? > Did any fall off that are still needed? > Review results of the / priority setting exercise > Reactions? > Even though it is not high priority doesn't mean it is not important maybe it happens later or is dealt with in some other way. > Are the results strategic? How do you make it more strategic? > If you did these, would you make substantial progress toward the goal/vision? Is it transformational? > Review strategic planning core elements and previous discussions: Are there gaps, were the issues addressed? 	<p>Considerations/ Prompting Questions (likely large group discussion):</p> <p>Easy wins and task them out:</p> <ul style="list-style-type: none"> ▶ Are these strategic? ▶ Report out on identification of the easy wins (large group, ~20 minutes) ▶ If time, work easy wins through "action worksheet"; however, tracking and evaluating progress is more important. <p>Sequencing:</p> <ul style="list-style-type: none"> ▶ Are some long-term actions or actions that can start later or are dependent on other actions being completed first? ▶ discuss where the High Priority Actions land the timeline, vertical columns that represent time frames ▶ Quarters? Fiscal Years? How specific should these be? <p>Complex:</p> <ul style="list-style-type: none"> ▶ Is there an activity that requires collaboration but there is an obvious lead?

Optional Exercise to Refine and Prioritize Key Actions *continued*

Time: 1–2 hours	Activity	Materials/Notes
15 minutes	<p>Wrap Up</p> <ul style="list-style-type: none">▶ Ensure there are champions for the different emphasis areas, outcomes, or key actions.▶ Action planning to include clearly defined roles and responsibilities, process for implementation, and ultimately accountability supports success.	
	<p>Virtual Consideration:</p> <ul style="list-style-type: none">▶ Exercise: Prioritize Key Actions<ul style="list-style-type: none">> If virtual, consider using Microsoft Forms to rank key actions.▶ Large Group Discussion: Consider individual reflections, the chat box, or small groups to discuss the ranking of key actions.	

Facilitator Notes

Facilitator Notes

