



From: Jeremy DeRoo, CEO
To: Dwelling Place Board
Date: October 4, 2021
RE: Strategic Planning for Dwelling Place

As Dwelling Place moves into its next strategic planning process, the CEO and Executive team will be seeking consultant services to assist us. Before soliciting proposals, we would like to discuss the idea of using this planning process to clarify "Why does Dwelling Place exist?" and how this "why" informs "How do we go about doing the work?" By contrast, the previous process focused heavily on "What will the work be?"

The expansion beyond the "what" is partly because work has already been performed to establish directionality here. The current strategic plan (Dwelling Place 2019-2022 Strategic Plan approved 8-7-19 [CEO Goals 2019 2020.pdf \(thirdsectorcompany.com\)](#)) establishes 4 primary priorities for the organization: Growth, CEO Succession Planning, Greater Community Awareness, and Staff Training and Development. The CEO succession, recruitment, and onboarding process appears to have generally affirmed these priorities, adding DEI as an additional priority and expanding CEO Succession to include succession planning for board and staff. This work appears to have laid a strong, practical foundation on which to build the 2023-2026 strategic planning process.

While this work established a strong foundation of what the work of the organization will be going forward, the departure of the long-term CEO does pose a significant change to the organization that is worth strongly considering during this strategic planning process. The transition of a long-term CEO creates an opportunity for the entire board and organization to broadly transfer and more intentionally hold the values and vision of Dwelling Place. A process designed around this opportunity would not necessarily result in changing the stated mission or vision of the organization, but would instead work to more intentionally articulate the organization's values and purpose in a way that ensures a shared understanding of what these terms mean. In doing so, we can establish a language and framework that can improve communication and facilitate board and CEO decision making going forward.

If there is general agreement on the expanded emphasis for strategic planning this time around, the Executive Committee, working with the CEO, will work to secure a consultant to facilitate this overall process. The CEO, working with staff through existing committees, will likely develop measurable outcomes around the current strategic plan's growth areas while the consultant guides both the board and staff through the identity-articulation process. This should allow us to accomplish both above-the-line and below-the-line planning during 2022.

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