

FEDERATED CITY EMPLOYEES' RETIREMENT SYSTEM  
 STRATEGIC PLANNING PROCESS  
 PRELIMINARY WORKPLAN AT JUNE 18, 2020

Step	Timing
1) Staff Input via: a) Telephone calls with staff b) Staff meeting(s)	June
2) Board to review preliminary strategic plan Workplan	June 18
3) Board input (mission, vision, risks, SWOT*, strategic issues, etc.) via: a) Strategic planning Survey b) Telephone follow-up calls (combined with board self-evaluation)	June/July
4) Staff to draft preliminary elements of Strategic Plan: a) Review all input gathered b) Develop preliminary Mission, vision, values statements c) Synthesize key risks and strategic issues identified d) Preliminary research into strategic issues	July/August
5) Staff to prepare preliminary design of Board Retreat	August/Sept.
6) Review design of Board retreat with Chair & Vice-Chair	August/Sept.
7) Conduct Board Retreat: a) Review/discuss preliminary work of staff b) Board to provide further input/feedback to staff	September 17
8) Staff to prepare draft Strategic Plan	Sept./Oct.
9) Staff to present draft Strategic Plan to Board for review and approval	Oct./Nov.
10) Board Approval	Oct./Nov.

\* Strengths, weaknesses, opportunities, threats