



**St. Louis Mental Health Board
Strategic Plan Refresh**

Timeline (As of 09.04.25)

Prepare for Retreat	
Early Aug	Finalize planning schedule and select board retreat date
Early Aug	Collect and review background documents (strategic plan, board minutes, financials, impact reporting, theory of change documents, annual report, etc.)
Aug 6, 10:30am	Background interview with Cassandra, agency tour & meet the Leadership Team
Aug 11, 2:30pm	Additional background info with Cassandra
Aug 20, 9am	Background interview with Serena
Aug 14, 10am	Background interview with Susan
Sept 2	Distribute values survey to all staff
Sept 9, noon	Deadline for submission of values survey
Sept 9, 2pm	Strategic Planning Committee kickoff meeting
Sept 10 & 17, 1-2:30pm	Focus groups (two groups of six staff) with staff
Sept 25, 11am	Leadership Team meeting to debrief focus groups, assess progress on current strategic priorities, identify emerging strategic priorities
Oct 1, 3pm	Leadership Team meeting to discuss & provide input on the retreat agenda
Before SPC mtg	Draft retreat agenda
Oct 14, 2pm	Strategic Planning Committee to finalize retreat plan
Oct 15	Finalize prep documents; send them to Board
Oct 17	Finalize retreat powerpoint
Facilitate Retreat	
Oct 18, 9am	Retreat at Delmar DivINe, Conf. Room 7, 5501 Delmar Blvd., 63112
Draft Plan & Submit for Consideration & Approval	
Oct 29, 10:30am	Leadership Team meeting to debrief the retreat and draft the strategic plan
Nov 5, 10:30am	Leadership Team meeting to continue work
Nov 10	Finalize strategic plan draft; Cassandra okays
Nov 11, 2pm	Strategic Planning Committee meeting
Nov 20	Board meeting to consider and approve strategic plan