

Strategic Planning Introduction & Practice

OVERVIEW, PURPOSES, AND RESOURCES

The Strategic Planning Program Team conducted its first introduction to strategic planning program in June 1997. Since then the program has been presented almost every year since its inception. An intermediate program was developed in 1998 and was offered almost every year between then and 2005.

Based on program evaluations, input from Extension professionals, the objectives of the UW-Extension Cooperative Extension Transformational Education Initiative, and the general recognition of the need to provide more context for strategic planning and other planning approaches, the Strategic Planning Team designed a 2 day program titled Transforming Communities and Building Community Capacity: An Introduction to Planning. The 2 day course was offered in April, 2008. These professional development opportunities continue the effort to prepare an ever-widening learning community of Extension personnel in the theory and practice of planning processes.

The overall purposes of the Strategic Planning Introduction and Practice program are to:

- Build a strong institutional capability for applying strategic planning approaches within all Program Areas of Cooperative Extension.
- Offer individual professional growth in strategic planning applications.
- Enable expanded programming in strategic planning applications for community organizations and local government.
- Establish a learning community of strategic planning practitioners who share a common interest and technical language.

The Strategic Planning Program responds especially to community organization, public official, and other needs for more effective and efficient decision making processes. The number and complexity of issues confronting community organizations and local governments are rapidly increasing. Differences in capacity among local groups to deal with these issues and develop effective policies and efficiently manage resources are, in themselves, issues that need to be addressed.

University of Wisconsin-Extension educators and educators in other states are, in many cases, using components or variations of strategic planning approaches in their local programming. The Strategic Planning Program builds on these techniques and skills in its curriculum, and further adapts state-of-the-art strategic planning approaches for use in meeting local needs.

This training program is intended to be highly interactive, with participants both learning and practicing strategic planning approaches, tools, and skills in small groups after each presentation. Participants receive a library of resource materials for continuing study and reference. An extensive listing of additional resources is also included with course materials.

Learning Objectives

Learning objectives for the program include:

- Participants will learn how to define and apply the strategic planning process in a variety of forms—from simplified “strategic thinking” to comprehensive strategic planning approaches.
- Participants will learn how to design and facilitate a strategic planning program – from initial meetings with the client through implementation and reassessment.
- Participants will learn to apply a selection of tools, techniques, and skills appropriate for each step in the strategic planning process.

Expectations

The Strategic Planning Team expects that program participants:

- Gain an understanding and improve their practice of the strategic planning approach and expand their knowledge and application of strategic planning skills and tools.
- Are stimulated by their experiences in the program, including their interaction with participants from different Program Areas and organizations outside Extension.
- Are exposed to new ideas on strategic planning, other types of planning, and other purposeful approaches in general.
- Will take their place among colleagues in a learning community to deepen their understanding of strategic planning and continue their acquisition and development of the skills, tools, and techniques involved in its practice.
- Will share the results of their efforts and accomplishments with colleagues and contribute positively to the development and wider practice of strategic planning.

Strategic Planning Program Binder & Resource Publications

The program materials binder has been arranged to generally follow the course agenda. Major sections have been separated by tabs, and sections 1-10 follow the ten steps identified in John Bryson’s **Strategy Change Cycle**. The Strategic Planning Team also provides, in addition to this binder, the following resource publications:

Bryson, John M. *Strategic Planning For Public and Nonprofit Organizations: A Guide for Strengthening and Sustaining Organizational Achievement*. 3rd Edition. San Francisco: Jossey-Bass, Imprint of John Wiley & Sons, Inc., 2004.

- Bryson, John M. and Alston, Farnum K. *Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations. 2nd Edition.* San Francisco: Jossey-Bass, Imprint of John Wiley & Sons, Inc., 2005.
- Grabow, Steven H., Hilliker, Mark, and Moskol, Joseph. *Comprehensive planning and citizen participation.* Madison, Wisconsin: University of Wisconsin-Extension. Publication #G3810, 2006
- Hinds, David G. *Building Community Capacity: Environment, Structure, and Action to Achieve Community Purposes.* Madison, Wisconsin: University of Wisconsin-Extension, Publication #G3840, 2008.
- Anderson, Marian, et al. *Facilitation Resources.* Six Volumes. Minneapolis: Hubert H. Humphrey Institute of Public Affairs and University of Minnesota Extension Service, 1999.
- Kaner, Sam; with Lind, Lenny; Toldi, Catherine; Fisk, Sarah; and Berger, Duane. *Facilitator's Guide to Participatory Decision-Making. 2nd Edition.* San Francisco: Jossey-Bass, Imprint of John Wiley & Sons, Inc., 2007.
- Tague, Nancy R. *The Quality Toolbox. 2nd Edition.* Milwaukee, Wisconsin: ASQ Quality Press, 2005.

Strategic Planning Program Team

Connie Abert, Waupaca County
Jennifer Erickson, Sauk County
Steve Grabow, Jefferson County
Mary Gruenewald, Family Living Programs
Catherine Neiswender, Winnebago County

Program Sponsor

Larry Jones, Program Development and Evaluation