Strategic Planning Introduction & Practice
Part One: Facilitating Strategic Planning

AGENDA

Day One

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>8:30 a.m.</td>
<td>Registration</td>
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<tr>
<td>9:00 a.m.</td>
<td>Program Overview – Connie &amp; Jenny</td>
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<td>• Ice breaker and introductions</td>
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<td>• Rules for the day (MN, p. 4.18)</td>
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<td>• Purpose and objectives for the day</td>
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<td>• Purpose: <em>To teach basic facilitation skills for use in strategic planning</em></td>
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<td>• Objectives include:</td>
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<td>• Participants will learn basic group dynamics theory and principles.</td>
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<td>• Participants will learn the basic role of facilitator.</td>
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<td>• Participants will gain a basic knowledge of tools, techniques and skills for facilitating meetings.</td>
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<td>• Participants will practice basic facilitation tools.</td>
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<td>• Four-day agenda (MN, pp. 3.11 - 3.14)</td>
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<td></td>
<td>• Facilitation resource review (MN, Tague, Kaner)</td>
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<td>9:45 a.m.</td>
<td>Facilitation Introduction – Steve</td>
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<td></td>
<td>• Purpose and definition of facilitation</td>
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<td>• What makes a good facilitator</td>
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<td>• Enriching and stimulating the facilitation experience</td>
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<td>• Recurring Process: Generate – Organize – Select</td>
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<td>10:30 a.m.</td>
<td>Break</td>
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<td>10:45 a.m.</td>
<td>The Dynamics of Groups – Catherine</td>
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<td>• Understanding group dynamics</td>
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<td>• Working with groups in the Strategy Change Cycle</td>
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<td>11:30 a.m.</td>
<td>Planning for Facilitation (“Pre-Work” in MN materials) – Steve and Connie</td>
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<td>• Mechanics of facilitation</td>
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<td>• Equipment (MN, p. 2.18)</td>
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<td>• Room arrangement (MN, p. 2.19)</td>
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<td>• Introduction to chart writing</td>
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<td>• Chart writing basics</td>
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<td>• Miscellaneous pointers</td>
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<td>• Opening and closing the meeting (MN, pp. 4.9 - 4.12)</td>
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AGENDA
Day One (continued)

12:10 Lunch

1:00 p.m. Roles, Skills, and Tools for Facilitating Strategic Planning – Mary

- Roles played by the planning coordinator and/or others during the strategic planning effort
- Skills useful in community development work
- Tools used to generate ideas, organize information, and aid in decision making
- Brainstorming, a tool used for generating ideas

FACILITATION TOOLS

1:45 p.m. Affinity Diagrams – Jenny

- Snowcard (MN, p. 5.18)
- Affinity mapping (Tague, pp. 96 - 100)

2:30 p.m. Break

2:45 p.m. Major Alternatives / Components / Details Tool – Connie

3:30 p.m. Decision Making I – Steve

- Decision Matrix (Tague, pp. 219 - 223)

4:15 p.m. Decision Making II – Catherine

- Voting / Consensus / We Agree / Gradients of Agreement (MN, pp. 5.7 - 5.16 and Tague, pp. 413 – 416; Kaner et al.)

4:30 p.m. Gantt/Activity Chart – Connie & Mary

(Tague, pp. 271 - 274)

4:50 p.m. Follow-Up and Questions – Jenny
Evaluation, Group Assignments and Homework – Connie

5:00 p.m. Adjourn
Strategic Planning Introduction & Practice
Part Two: The Strategy Change Cycle

AGENDA
Day Two

9:00 a.m.  Introductions and Ground Rules – Catherine and Jenny
Review Agenda and Table of Contents
Review Learning Objectives
Overview of Resources for Skills & Tools

INTRODUCTION TO STRATEGIC PLANNING & REVIEW OF CONTEXT

9:30 a.m.  Introduction to Planning – Steve

10:20 a.m.  Break

10:35 a.m.  Participants' Experiences with Groups – Catherine

11:05 a.m.  Overview, Strategic Planning Process Steps, and Glossary of Terms – Steve

THE STRATEGIC PLANNING PROCESS

11:30 a.m.  Step 1:  Plan for Planning and Diagnosis– Mary (SP Binder, Tab 1)

Noon  Lunch

1:00 p.m.  Stakeholder Analysis – Connie (SP Binder, Tab 1)

1:45 p.m.  Step 2:  Mandates – Jenny (SP Binder, Tab 2)

2:15 p.m.  Step 3: Mission / Values – Steve (SP Binder, Tab 3)
AGENDA
Day Two (continued)

2:50 p.m.  Break

3:05 p.m.  Introduction of scenario and Small Group Practice Sessions – Connie

3:15 p.m.  Mission / Values Practice Session – Worksheet Adaptations and Mission Statement – Mary (Wordsmithing Tool)

4:40 p.m.  Mission / Values Discussion – Mary

4:50 p.m.  Feedback - Connie
  o  Facilitator Assignments
  o  Preview of the Next Day
  o  Evaluation

5:00 p.m.  Adjourn
AGENDA
Day Three

8:30 a.m.  Step 4: External / Internal Environments – Steve & Mary (SP Binder, Tab 4)

9:00 a.m.  Strengths, Weaknesses, Opportunities, Challenges (SWOC), Practice Session – Mary
(Brainstorming / SWOC Analysis Tool)

9:45 a.m.  SWOC Discussion Session – Mary

10:00 a.m.  Break

10:15 a.m.  Step 5: Strategic Issues – Catherine & Jenny (SP Binder, Tab 5)

10:45 a.m.  Strategic Issues Practice Session – Catherine & Jenny
(Worksheet Adaptations)

11:45 a.m.  Strategic Issues Discussion – Catherine & Jenny

Noon  Lunch

1:00 p.m.   Step 6: Strategy Formulation – Steve & Connie (SP Binder, Tab 6)

1:30 p.m.   Strategies Practice Session (Worksheet MA/C/D Tool) – Steve

2:30 p.m.   Strategies Discussion – Steve

INTRODUCTION TO STRATEGIC MANAGEMENT

2:45 p.m.   Step 7: Review and Adopt the Strategic Plan – Steve (SP Binder, Tab 7)
(The shift from strategic planning to strategic management; Role changes of the Extension professional and the organization; Implementation plan for the organization)

3:00 p.m.   Break

3:15 p.m.   Step 8: Visioning/Vision Sketch – Jenny & Connie (SP Binder, Tab 8)

3:45 p.m.   Step 9: Plan Implementation - Mary and Catherine (SP Binder, Tab 9)
Step 10: Reassessment (SP Binder, Tab 10)

4:30 p.m.   Feedback – Catherine
  o Facilitator Assignments
  o Preview of the Next Day
  o Evaluation

4:40 p.m.   Adjourn
AGENDA
Day Four

8:00 a.m.  Step 1: Plan for Planning – Mary (SP Binder, Tabs 1 & 13)
8:10 a.m.  Plan for Planning Exercise Session – Mary
9:30 a.m.  Plan for Planning Discussion – Mary

CASE STUDIES

9:45 a.m.  Case Studies and Critiques – Steve

- Case 1: ______________________________________
- Case 2: ______________________________________

10:15 a.m.  Break

10:30 a.m.  Case Studies and Critiques Continued - Steve

- Case 3: ______________________________________

10:45 a.m.  Application of Process and Wrap-Up – Strategic Planning Team

11:45 a.m.  Evaluation

12:00 p.m.  Box Lunch and Adjourn

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