

Strategic Planning Introduction & Practice

Part One: Facilitating Strategic Planning

AGENDA

Day One

INTRODUCTION

- 8:30 a.m. Registration
- 9:00 a.m. Program Overview – Connie & Jenny
- Ice breaker and introductions
 - Rules for the day (MN, p. 4.18)
 - Purpose and objectives for the day
 - Purpose: *To teach basic facilitation skills for use in strategic planning*
 - Objectives include:
 - Participants will learn basic group dynamics theory and principles.
 - Participants will learn the basic role of facilitator.
 - Participants will gain a basic knowledge of tools, techniques and skills for facilitating meetings.
 - Participants will practice basic facilitation tools.
 - Four-day agenda (MN, pp. 3.11 - 3.14)
 - Facilitation resource review (MN, Tague, Kaner)

FACILITATING STRATEGIC PLANNING

- 9:45 a.m. Facilitation Introduction – Steve
- Purpose and definition of facilitation
 - What makes a good facilitator
 - Enriching and stimulating the facilitation experience
 - Recurring Process: Generate – Organize – Select
- 10:30 a.m. Break**
- 10:45 a.m. The Dynamics of Groups – Catherine
- Understanding group dynamics
 - Working with groups in the Strategy Change Cycle
- 11:30 a.m. Planning for Facilitation (“Pre-Work” in MN materials) – Steve and Connie
- Contracting and diagnosing (MN, pp. 2.9 - 2.17)
- Mechanics of facilitation
 - Equipment (MN, p. 2.18)
 - Room arrangement (MN, p. 2.19)
 - Introduction to chart writing
 - Chart writing basics
 - Miscellaneous pointers
 - Opening and closing the meeting (MN, pp. 4.9 - 4.12)

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
- Facilitator Assignments
 - Preview of the Next Day
 - 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
- Facilitator Assignments
 - Preview of the Next Day
 - 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**
- 10:30a.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

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Mary Gruenewald, Family Living Programs
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