

Strategic Planning Facilitator Guide

2016-05-31

Topic	Content	Activity	Reference	Time
Opening	Set the Context Introductions Ice breaker of your choice Agenda Review	Introductions/Ice Breaker Agenda Logistics		15 minutes Plus time for ice breaker
Develop Desired Future State: External Trends and Forces	Goal 1. Determine what are other people doing that is influencing what you see your future will look like? 2. What impact or influence will these have on you? 3. What is emerging? What will be shaping your future?	Facilitator 1. Review suggested topics and edit per group feedback. 2. Distribute post-it notes. Create single flipchart with External Trend title and reference to Domain. 3. Count number of categorized items. Distribute dots to groups, see reference for #. 4. Photograph work. Participants 5. Write comments in each "category" and post on flipcharts. (5 minutes of writing, 5 minutes of distribution) 6. Team effort to group and categorize comments. (10 minutes) 7. Vote with dots. Vote can be distributed as individuals see fit (all dots on one item, etc.)	<ul style="list-style-type: none"> • External Trends Worksheet • External Trends details slide deck. • Dot Voting. <ul style="list-style-type: none"> ○ Each participant gets to vote multiple times. ○ The number of votes is calculating by dividing the total number of clustered categories by 2 and adding 1 to the result. ○ Example: 17 clustered categories = $(17/2)+1 = 8.5+1 = 10$ votes. 	30 minutes
Develop Desired Future State: Determine Key Forces and Trends	Goal 1. Determine which forces should be addressed. 2. Gain understanding about the implications of the threats. Specifically, what they mean to the institution?	Facilitator 1. Identify the top four trends and break team into smaller groups. Note: Use a random count off (1-4) and allow individuals to move to another group if they want to. Groups should have 5-7 people each. Base the number of trends to be addressed by the number of people participating but focus on 3-5 at most.	<ul style="list-style-type: none"> • MOR Scenario Planning Handout. • Scenario Planning slide deck. 	30 minutes

	3. Develop a statement/goal for a desired Future State.	<p>2. Give instructions on developing a desired future state. In light of the implications, where do we want to be?</p> <p>3. Elect someone from each group to report out.</p> <p>4. Prepare to post flipcharts for observations.</p> <p>5. Photograph work.</p> <p>Participants:</p> <p>6. Work together to identify (list) implications of comments.</p> <p>7. Review the implications and determine a desired future state.</p> <p>8. Develop a future state statement or headline.</p>		
Lunch		Group report outs and selection of presenter for large group breakout.		60 minutes Come together for lunch with five-minute reports by each group towards the end of the meal.
Develop Strategic Objectives: SMARTify Future State	Goal SMARTify the Future State headlines or statements and present as objective.	<p>Facilitator</p> <p>1. Present SMART process via slide deck and hand out.</p> <p>2. Have groups meet in previous working teams.</p> <p>3. Have group SMARTify the Future State statement.</p> <p>4. Photograph work.</p> <p>Participants</p> <p>5. Turn future state headline into SMART goal statement.</p>	<ul style="list-style-type: none"> • SMART goals overview slide deck. • Writing goal statements handout. 	20 minutes

<p>Develop Strategic Objectives: Assess Current State</p>	<p>Goal Assess and discuss current state.</p>	<p>Facilitator 1. What is the current state? 2. What are we doing well? 3. Where are we struggling? 4. Photograph work. Participants 5. Activity: a. Take 1 time to write pros and cons on post it notes +/- b. Post with future state statement – (5 minutes). c. Share comments amongst the team (10 minutes).</p>	<ul style="list-style-type: none"> • Gap Analysis, Current State slide deck 	<p>20 minutes</p> <ul style="list-style-type: none"> • 5 minutes (individual time) • 5 minutes to post • 10 minutes for team review
<p>Develop Strategic Objectives: How to Get to Desired Future State</p>	<p>Goal How to close gap between current and desired future state?</p>	<p>Facilitator Knowing what we know of our current environment, what specific steps can we take to achieve desired future state. 1. Conduct Gaps Analysis: – how we will get to the future state – (30 minutes) 2. Activity: Develop 1 to 3 strategies to close the gap (20 minutes) 3. How can we achieve the desired future state? 4. Photograph work.</p>	<ul style="list-style-type: none"> • Gap Analysis, Current State slide deck 	<p>50 minutes</p> <ul style="list-style-type: none"> • 30 minutes – Gap Analysis • 20 minutes – 1-3 strategies to achieve future state.
<p>Wrap-up</p>	<p>Goal Report out on strategy. Check in on process. Advise on next steps – convene a group to draft a strategic thinking document followed by community comments and final draft.</p>	<p>Facilitator 1. Report out 2. Determine if group is satisfied with progress or if additional work is needed. 3. Review next steps. 4. Get feedback on what pluses and deltas for the day 5. Photograph feedback.</p>		<p>30 minutes</p> <ul style="list-style-type: none"> • 20 minutes – Strategy report out from each group. • 5 minutes – Wrap up. • 5 minutes – Pluses and deltas.

Materials

1. Pens
2. Markers
3. Post-it Notes, (medium size)
4. Dots for voting (20-30 per person)
5. Flipchart paper (self-stick) to replace easels - (12 – flipcharts, 3-5 easels)
6. Nametags
7. Participant list (make copies)
8. External Trends handout and slide deck
9. Scenario Planning handout and slide deck
10. SMART Goals handout and slide deck
11. Gap Analysis/Current State handout and slide deck

Plan Groups (Example: 3 domains with three goals each)

1. Communication – 20
2. Cultural Heritage – 23
3. Teaching and Learning – 18

Logistics

1. Reserve meeting and break out rooms
2. Develop participant lists
3. Send out notifications and invitations
4. Define facilitator roles and do a walk-through
5. Photograph flip charts, along the way
6. Evaluate process at lunch and adjust as needed?
7. Remind people that they are informing the strategy, not writing it?

Documentaion

1. Photograph all work and summarize with notes immediately after the exercise