

Guidelines for Demonstrating Effective *Participatory Strategic Planning*

for Certification Candidates and their Mentors, Observers and Assessors

General

- At least one well designed strategic plan with agenda (may be a cofacilitated plan)
- Evidence of having facilitated all parts face-to-face and not virtually
- A reflection sheet for the entire strategic plan is provided (we don't need 5 individual reflection sheets)

Content Includes

- Context for entire strategic plan
- Strategic Plan focus question and methods for determination including rational and experiential aims
- Workshops for vision, contradictions, strategic directions and implementation with clear process and time indicated
- Focused Implementation plan
- A resolve for the plan with a clear roll out and accountability plan

The Facilitation Process Demonstrates

- Materials for each section prepared and ready to use
- Strategic planning focus question, rational and experiential aims, and context setting for the planning process reflect an understanding of the group's situation.
- Ability to describe each step of the process to the group
- Understanding of the unique energies required in each of the four workshops
- Capacity to hold space for ambiguity and differences in clustering and naming for each of the 4 steps of the planning process
- That "naming" language is appropriate for each of the four workshops, for example
 - Vision titles include description of a compelling image of the future
 - Contradictions describe realities preventing progress toward the vision
 - Strategic Directions address the contradictions to move towards the vision. They connote directional movement and are named using gerund nouns (i.e., start with "ing" verb)
 - Focused Implementation includes concrete plans for 1 year and 90-days
- Ability to shepherd the group throughout the entire planning and implementation process.

Documentation

- A chart for each workshop in participants' own words, each on one page.
- As much as possible, graphics, photographs and use of color are used to illustrate process and deliverables

Examples of Assessor Questions for Evidence of Competence

- How do you know when to use the ToP Strategic Planning process?
- What is the process you use to help the group discern the overarching focus question and aims for strategic planning?
- How do you select and conduct environmental assessments for strategic planning?
- How do you hold and balance the energy of a group in each phase of strategic planning?
- Share stories of your experience of shepherding the group through the process.
- What impact have you observed resulting from the ToP Strategic Planning cycle for an organization?

Rating

- 3 = all the above elements are included and there is at least one 90-day plan
- 4-5 = all the above elements are included plus effective use of interactive activities such as the knot or left brain/right brain activities and imagery; exceptionally well-named titles at each stage; and, documentation that is attractive and representative of the process.