

Participatory Strategic Planning - Whiteboard Information

Version 3 posted by Sheila LeGeros on Wednesday, March 25, 2009 9:57 AM

Here is an example of how we might use the Whiteboard feature of Huddle

It looks to me like this is mostly a collaborative editing tool.

Sheila

Participatory Strategic Planning The strategic planning process may be conducted over a period of several days in a row, in a retreat format; or it may be broken into smaller chunks spread-out over a period of weeks. The structure depends on preference and availability of board members. The following diagrams depict two possible approaches. We will modify this based on the requirements of the client.

Option A Day 1 (4 hours) Day 2 (4 hours) Day 3 (4 hours) Environmental Scan Underlying Contradictions Focused Implementation Part 1 Practical Vision Strategic Directions Focused Implementation Part 2

Option B Day 1 (4 hours) Day 2 (8 hours) Environmental Scan Underlying Contradictions Practical Vision Strategic Directions Focused Implementation Part 1 Focused Implementation Part 2

Below is a description of each element of the strategic planning process:

Environmental Scan. An environmental assessment helps participants gain insight into factors that may drive or influence success. Such preparation creates a common context for creating a vision for the future. The group will deeply explore the research done prior to the retreat, and decipher implications for the strategic planning process.

Practical Vision. A practical vision is a statement of what the group wants to see in place in 3 to 5 years time. The practical vision is a shared, inspiring description of where the organization is going, written in concrete, descriptive language. When stated objectively, it fuels energy and endurance.

Underlying Contradictions. Contradictions are blocks or barriers that prevent the

realization of a vision. Identifying contradictions to a vision moves a group beyond familiar problems, and opens the door to new insights and alternative avenues for action. Strategic Directions. Strategic directions are broad directions or proposals that impact the future by catalyzing movement in the direction of the organization's vision. Strategic directions provide realistic frameworks that help the organization filter and focus its movement toward its vision.

Focused Implementation Part I. The group determines its major accomplishments for year one for each strategic direction. Accomplishments are specific and measurable. Participants create a quarterly calendar showing when each accomplishment will be completed.

Focused Implementation Part II. The group creates implementation steps with budget and resources identified; roles, responsibilities and deadlines assigned. The preparatory process for strategic planning includes the following items: Retreat Design Team. The board appoints a small team of people responsible for the retreat design. Participant Interviews. The facilitator confidentially interviews all retreat participants by telephone for 20 to 30 minutes each, to learn about their hopes and concerns for the retreat. The facilitator boils this information down to key themes, with no identities revealed, and shares the information with the Retreat Design Team. Design Conference. The team meets with the facilitator to discuss details of the retreat design. Agenda. The facilitator submits a draft agenda to the Retreat Design Team for review and comment. The design is iterated until the team is satisfied. Key benefits of hiring a professional facilitator vs. asking a board member to facilitate the meeting are: Neutrality. No matter the good intentions of a board member, it is very difficult to remain a neutral facilitator through the entire process. A third-party facilitator can more easily remain neutral. Hear all Voices. When a board member acts as facilitator, he or she cannot voice an opinion or share wisdom, because of the need to remain neutral. Outcome. A trained and certified facilitator has skills and techniques to design an efficient process to achieve the desired outcomes, manage conflict, tap multiple intelligences, manage time, and get the best results. Time. Putting on a quality 12-hour retreat requires a minimum of 48 hours of preparation and follow-up. Hiring a professional facilitator saves an enormous amount of volunteer time.

Comments

[Sheila LeGeros](#) Posted on Wednesday, March 25, 2009 9:56 AM (Comment

added to file version 2)

Ah, now I figured out that if I click the EDIT button at the bottom of the entry, I am able to edit the text. Now that's interesting.

[Sheila LeGeros](#) Posted on Wednesday, March 25, 2009 9:52 AM (Comment added to file version 1)

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Overview

Version History

Audit Trail

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