

Bite Size Pieces
Learning Topic: Overview of Board Member Responsibilities
Module One

1. Recommended Pre-requisite(s) – None – this is the first module!

2. Learning Objective

Understand the basics of strategic planning

This session allows board members to better understand the basic components to strategic planning and why it is important for clinics to engage in this process. It is intended to be both presentation and discussion-based.

Note – Relax! You don't need to be a trained facilitator to run this session – everything you need is provided with this module.

3. Content Covered

Overview of strategic planning

4. Learning Outline

Before the session, read pages 51-52 of the Board Manual Template in order to become better acquainted with the strategic planning language and process within the clinic system.

Print out enough copies of the session handout

Begin the session by asking board members to share their understanding and experience with strategic planning with you and their colleagues. (5 minutes)

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Provide board members with the handout and ask them to read through the material. (5 minutes)

Ask board members to discuss the benefits of strategic planning in the context of your clinic with particular emphasis on those benefits your clinic would most like to realize through its planning efforts. (5 minutes)

5. Equipment and Materials Needed

Handout – “Benefits of Strategic Planning” (page 5-6)
Board Manual Template

Note – The board manual template is available on the BSWG website at www.onboardlegalclinics.org under ‘Board Tools’

6. Timeframe

15 minutes

7. Facilitator Notes

Note – Use this section to make your own notes about the session. Be sure to share anything of an evaluative nature when the session is over.

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8. Results/Evaluation

Please make enough copies of the Evaluation form (page 7-8) and have each participant complete and hand in to you at the end of the session

Note – Evaluation is an important part of our training success! Please ask all participants to complete an evaluation form.

9. Next Steps

Consider adding another Bite Size Piece module to your next agenda.

Ask a volunteer to lead the next session

Encourage all board members to visit:
www.onboardlegalclinics.org to sign up for automatic updates on board learning and development

Tip – why not download the ‘Bite Size Pieces Board Training Grip’ which your board can use to track what training has been covered and who has been a session leader?

Learning Topic – Strategic Planning – Module One
Handout – Benefits of Strategic Planning

Benefits of Strategic Planning

A few words about planning

“To achieve great things, two things are needed: a plan and not quite enough time” (Leonard Bernstein)

“Planning is bringing the future into the present so you can do something about it now” (Alan Lakein)

“A good plan today is better than a perfect plan tomorrow” (George Patton)

“However beautiful the strategy, you should occasionally look at the results” (Winston Churchill)

It's All About

Understanding the Current State

Imaging the Ideal Future

Assessing the gap between the two and then developing strategies, goals, objectives, action plans to address the gaps in order to make the future state a reality

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Evaluation

Benefits of Strategic Planning

- Encourages commitment to the vision
- Allows for dialogue on issues facing the organization
- Acts as a template for future action
- Helps orient new board members
- Clearly defines the purpose of the organization
- Helps establish realistic goal and objectives consistent with the mission in a defined time frame and within the organization's capacity for implementation
- Makes is easier to communicate the goes and objectives to stakeholders
- Develops a sense of ownership of the plan
- Ensured the most effective use is made of the organization's resources
- Provides a base from which progress can be measured and establishes a mechanism for informed change when needed
- Brings together everyone's best and most reasoned efforts that have important value in building a consensus about where the organization is going
- Provides clearer focus, producing more efficiently and effectiveness
- Creates a bridge between staff and the board of directors
- Builds strong teams in the board and the staff
- Provides the glue that keeps the board together
- Helps solve major problems

Based of Strategic Planning in nonprofit or for-profit organizations Written by Carter McNamara, MBA, PhD from the Free Management Library
@<http://www.managementhelp.org>

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Evaluation

Name of Clinic:

Module Name: Benefits of Strategic Planning

Date:

Module Number: One

About this Module

(To be completed by all participants and the session leader)

This material contributed to a better understanding of the topic

Disagree Neutral Agree Strongly Agree

The Content was relevant

Disagree Neutral Agree Strongly Agree

The content was organized and easy to follow

Disagree Neutral Agree Strongly Agree

The time spent on this module was worth it

Disagree Neutral Agree Strongly Agree

For an introductory session, the level of the content material was:

Too Advanced Just Right Too Basic

This module could be improved by:

Bite Size Pieces

Evaluation

About Bite Size Pieces Training

(To be completed by all participants and the session leader)

This is an easy and cost-effective way to learn

Disagree Neutral Agree Strongly Agree

I like making learning a board agenda topic

Disagree Neutral Agree Strongly Agree

Everyone on the board should take a turn at leading a session

Disagree Neutral Agree Strongly Agree

About the Bite Size Pieces Facilitation

(To be completed by the session leader)

I found the facilitation notes and material easy to follow

Disagree Neutral Agree Strongly Agree

I enjoyed my role as session leader

Disagree Neutral Agree Strongly Agree

Session Leader. Please provide a copy of this evaluation form to each participant and ask that it be completed and returned to you at the end of the session.

Tabulate all results on a separate sheet and fax to the BSWG at: 1-866-674-6714. You can also send an email of the results to: contact@onboardlegalclinics.org