

Bite Size Pieces

Strategic Planning Terms – Module Two

1. Recommended Pre-requisite(s) – Strategic Planning BSP Module One

2. Learning Objective

To Develop a Shared Understanding of Strategic Planning Terms and Definition

This session allows board members to develop a common language to describe the strategic planning process

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

The components of the strategic planning process
Definitions of strategic planning terms
Examples of strategic planning components

Note – Has your board already completed Strategic Planning BSP Module One? If not, you can download it from the BSWG website at www.onboardlegalclinics.org

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 the 'Strategic Planning

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Terms & Definitions' exercise and make copies of your clinic's vision/mission.

Handout the exercise. Explain that the strategic planning terms in the first column are in the correct order but that the definitions provided next to each are not correct.

Ask board members to match up each term with its correct definition.

Once everyone has had a chance to do their 'matching exercise', go through the sheet, polling the group for their answers for each term and then by reading out the correct answer. (5 minutes)

Discuss the differences and similarities people see between their list and the one on the sheet or flip chart. Remind board members that while there are no absolute 'correct' answers, these are the definitions being used by the clinic system to build a common strategic planning language. (10 minutes)

Hand out the clinic's vision/mission for review. Ask everyone to review it before the board works through the next Strategic Planning module. Tell the board that in the next module they will be considering their clinics strengths, weaknesses, opportunities & threats.

Option – Write up the correct answers on a flip chard ahead of time and then show it to the group once they've completed the exercise.

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Option – Some people worry about their answers being wrong. You might consider asking pairs of board members or setting up two teams to work through the exercise.

Option – If you wish you can also provide the answer sheet (page 8-9) as a handout.

5. Equipment and Materials Needed

Exercise – “Strategic Planning Terms and Definitions”
(page 6-7)

Exercise – Facilitator’s Answers/Handout (page 8-9)
Your clinic’s current vision/mission

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 10-11) 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 Two
Facilitator’s Answers – Strategic Planning Terms and
Definitions

Match up the strategic planning term with its definition by drawing a line to connect the two that you think go together or by writing beside each term the number of the definition you think best applies.

Term	Definition
A. Strategic Plan/Strategic Planning Process	1. Concrete measurable plans for meeting top priorities
B. Vision	2. A realistic look at all the factors affecting the future success of the organization
C. Mission	3. Positive elements within the organization
D. Values	4. The ongoing process of ensuring that the plan stays alive and continues to reflect the changing environment
E. Situational Assessment	5. Positive elements outside the organization
F. Strengths	6. A high level description of the organization’s view of the future
G. Weakness	7. Clearly defined programs that support the aims/goals/objectives of the
H. Opportunities	
I. Threats	
J. Strategic Imperatives	
K. Strategic Goals and Objectives	
L. Action Plans and Programs	

Learning Topic – Strategic Planning – Module Two
Facilitator's Answers – Strategic Planning Terms and
Definitions

<p>M. Monitoring and Evaluation</p>	<p>organization</p> <p>8. A high level description of the organization's purpose, the products/services it provides and the people it serves</p> <p>9. The foundation for organizational behaviour and culture</p> <p>10. A management tools used to improve organizational performance AND a process for building commitment for the job ahead</p> <p>11. Negative elements within the organization</p> <p>12. High level aims of the organization</p> <p>13. Negative elements outside the organization</p>
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Learning Topic – Strategic Planning – Module Two
Facilitator's Answers – Strategic Planning Terms and
Definitions

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Learning Topic – Strategic Planning – Module Two
Facilitator’s Answers – Strategic Planning Terms and
Definitions

Name of Clinic:

Module Name: Strategic Planning Terms and Definitions

Date:

Module Number: Two

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:

Learning Topic – Strategic Planning – Module Two
Facilitator’s Answers – Strategic Planning Terms and
Definitions

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