

Bite Size Pieces

Understanding Your Clinic's Strategic Imperatives Module Four

1. Recommended Pre-requisite(s) –Strategic Planning Modules One, Two and Three

2. Learning Objective

Understanding the Key Strategic Imperatives for your Clinic

This session allows board members to review and discuss the direction the Clinic will be taking over the next three to five years before committing to a full implementation plan. It assumes a Strategic Planning Committee has been working with the materials developed at previous session and is bringing back the first stage of a 'high level' strategic plan for review by the board. As such, it is intended to be a discussion-based and assumes a fairly high level of consensus among board members on the Vision, Mission challenges and opportunities facing the Clinic.

Note – This session cannot be tackled until the board has set up a Strategic Planning Committee or assigned the tasks to another committee on the board. Please review Module Three for more information by downloading it from the BSWG website – www.onboardlegalclinics.org

Be sure to review the 'Learning Outline' notes for this module well in advance of the board meeting so that the committee can complete what's required in advance of carrying out this module.

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3. Content Covered

Key Strategic Imperatives

4. Learning Outline

In advance of the session:

- Set up a meeting of the Strategic Planning Committee to go over all of the information developed to-date and to determine what information is still needed
- Review the draft SWOT and consider the best way of confirming that the SWOT points are valid
- Review the definition and examples of strategic imperatives in the Board Manual Template
- Develop a preliminary list of 3-5 key strategic imperatives
- Begin the process of completing the 'Strategic Imperative Template' (attached)
- For each key strategic imperative, identify the strengths that will help achieve the imperative; those weaknesses that must be addressed in order to achieve the imperative; the opportunities you could seize that would contribute to the achievement of the imperative; and the threats that must be mitigated in order to fulfill the imperative
- Agree to discuss these further once the information is collected and the validation complete

Before the session:

- Post the list of 'Terms & Definitions' from Module #2
- Post the original list of SWOT items developed by the board in Module #3

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- Fill in the 'Strategic Imperative Template' with any additional information you now have
- Make sufficient copies for the board members

Hand out copies of the completed 'Strategic Imperative Template'.

Ask a member of the Strategic Planning Committee to explain the newly 'culled' list and how the committee arrived at it. **Ask a second member** of the Strategic Planning Committee to review any further information collection and validation work that is going on. (5 minutes)

Discuss and reach consensus on 3-5 Strategic Imperatives. (15 minutes)

Agree to have the Strategic Planning Committee now take this to the Goal Setting and Action Planning stage.

Agree to send out a draft Strategic Plan before the next board meeting.

5. Equipment and Materials Needed

Strategic Planning Process and Definitions (see Module Two)

Strategic Imperative Template (page 6-10)

SWOT analysis results developed by the Strategic Planning Committee

6. Timeframe

15 minutes

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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 11-12) 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 Four
Handout – Strategic Imperative Template

Clinic Vision:

Mission:

Strategic Imperative One:

Strengths

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Weaknesses

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Opportunities

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Threats

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Learning Topic – Strategic Planning – Module Four
Handout – Strategic Imperative Template

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Strategic Imperative Two:

Strengths

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Weaknesses

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Opportunities

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Threats

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Learning Topic – Strategic Planning – Module Four
Handout – Strategic Imperative Template

Strategic Imperative Three:

Strengths

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Weaknesses

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Opportunities

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Threats

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Strategic Imperative Four:

Strengths

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Learning Topic – Strategic Planning – Module Four
Handout – Strategic Imperative Template

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Weaknesses

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Opportunities

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Threats

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Strategic Imperative Five

Strengths

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Learning Topic – Strategic Planning – Module Four
Handout – Strategic Imperative Template

Weaknesses

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Opportunities

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Threats

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Bite Size Pieces

Evaluation

Name of Clinic:

Module Name: Understanding Your Clinic's Strategic Imperatives

Date:

Module Number: Four

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