

## Bite Size Pieces

### Developing a High Strategic Plan for Your Clinic Module Five

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

### **2. Learning Objective**

Developing a High Level Strategic Plan for your Clinic

This session allows board members to review and discuss the proposed implementation plan for the Clinic's three to five year strategic plan. It assumes a Strategic Planning Committee has been working with the materials developed at previous sessions and is bringing back a more complete but still 'high level' strategic plan for review by the board. This module is intended to be discussion-based and assumes a fairly high level of consensus among board members on the Vision, Mission and Strategic Imperatives for the Clinic moving forward.

Note – This session cannot be tackled until the board has set up a Strategic Planning Committee or assigned the tasks to another committee of the board. Please review Module Four for more information by downloading in from the BSWG website – [www.onboardlegalclincis.org](http://www.onboardlegalclincis.org)

### **3. Content Covered**

Creating a high level strategic plan

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#### 4. Learning Outline

##### **In advance of the session:**

- Hold a meeting of the Strategic Planning Committee to go over the feedback received during Module #4
- Confirm all of the information developed to-date
- Review the definitions and examples on pp 52 of the Board Manual Template covering strategic goals & objectives and action plans & programs
- Begin the process of developing these for your Clinic by completing a draft plan using the 'Strategic Plan Outline' provided

##### **Before the session:**

- Add to the 'Strategic Plan Outline' any additional information you now have
- Send it out one week in advance of the meeting for the board members to review
- Encourage board members to share their insights with you in advance of the meeting
- Prepare a summary of feedback received

**Discuss** the document (have a member of the Strategic Planning Committee take notes) and agree on what more is needed before turning it over to staff for their review on how to best 'operationalize' the plan. (20 minutes)

Note – This module includes a Strategic Plan outline which is available for download along with the module notes at: [www.onboardlegalclinics.org](http://www.onboardlegalclinics.org)

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#### **5. Equipment and Materials Needed**

Strategic Plan Outline (available for download with this module – see ‘note’ below)

Board Manual Template

Note – The Strategic Plan Outline was provided along with this module on the BSWG website.

The Board Manual Template is also available on the site at [www.onboardlegalclinics.org](http://www.onboardlegalclinics.org) on the ‘Board Tools’ page under ‘Tool Kit’

#### **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 6-7) 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](http://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?

# Bite Size Pieces

## Evaluation

Name of Clinic:

Module Name: Developing a High Level Strategic Plan for Your Clinic

Date:

Module Number: Five

### 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](mailto:contact@onboardlegalclinics.org)