



TOOL KIT #6

STRATEGIC PLANNING

How to Use Tool Kit #6

This is the sixth of six Tool Kits in a series developed for OSEP Parent Training and Information Centers and Community Parent Resource Centers to ensure sound nonprofit governance practices. This training packet addresses Strategic Planning.

This toolkit includes modules Parent Centers can use for Board professional development on three topics related to Strategic Planning: Why Strategic Planning is Important, How to Conduct a Strategic Plan, and Implementing a Strategic Plan. Each topic includes:

- a short video that you can stream anywhere you have an internet connection
- a Dialogue Guide (a series of slides with information and thought-provoking questions meant to prompt discussion/reflection on a topic)
- a FAQ (some of the most common questions that Boards have about the topic)
- a Resource List (great web-based and PDF handouts on the topic area)

You can use these materials selectively to meet the professional development time available and the specific needs of your own Parent Center. Here is one suggested plan for using Tool Kit #6 materials with your Board:

- Plan 40 - 45 minutes on your Board agenda;
- Show the video first (10 - 15 minutes);
- Use the Dialogue Guide next (10-15 minutes). You can either use the Dialogue Guide as a PowerPoint for all to see and/or print hard copies. The Dialogue Guide is intended to guide a short board discussion applying the ideas from the video to your own center;
- Next, distribute the FAQ Sheet and Resource List (5 minutes). Both resources can be a “take home” for the Board of key points and important supplementary materials. If time permits, they can be reviewed during the Board professional development. Or, select 1-2 Resources from the list that really speak to you and provide these;
- Finally, use the Evaluation form (5 minutes).

If you would like more details, the chart that follows below briefly describes each product in the three Tool Kit #6-topic areas. Also included is a time estimate for each product and suggestions for optional materials to use during the Board professional development.

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STRATEGIC PLANNING

| Topic area | Product | Description | Time Needed | Optional Materials Needed |
|--|----------------|---|------------------|---|
| WHY STRATEGIC PLANNING IS IMPORTANT | Video | This video https://youtu.be/pzUcUvt0zE0 frames the Board role in Strategic Planning, the benefits of planning, outlines other kinds of shorter term planning and outlines why strategic planning is “mission critical” for Parent Centers. | 10 – 15 minutes | Internet connection |
| | Dialogue Guide | This Guide includes PowerPoint Basic content on the Board role, definitions of Strategic Planning, the benefits of planning, and engages participants in a discussion of their experiences and hopes for the process. | 10 – 15 minutes | Your organization’s Strategic Plan |
| | FAQ | FAQs address five basic questions about why Strategic Planning is important, including how Strategic Planning relates to Parent Center deliverables. | NA | NA |
| | Resource List | Links and resources to hand out or use selectively. | NA | NA |
| HOW TO PREPARE A STRATEGIC PLAN | Video | This video https://youtu.be/CDAEhb37JTE outlines the basic logistical considerations in planning, and discusses the process including strategic thinking, goals, tools, and the written plan. The video reinforces the message that while strategic planning does not have to be complicated, a well-designed process is needed. | 10 – 13 minutes | Internet connection |
| | Dialogue Guide | This Guide engages Board members in discussing questions to prepare for planning and exercises in strategic thinking, outlines types of goals, introduces tools for planning including a SOAR exercise, and presents a sample format for a Strategic Plan. | 20 – 25+ minutes | Flip chart & markers; HOs: <i>Big Picture Thinking; Blue Sky Committee; Generative Thinking; Minnesota Council of Nonprofits Strategic Plan 2010-2014</i> |
| | FAQ | The FAQ provides five considerations in preparing to plan, strategic thinking, areas addressed by the plan, how to use information in planning, and how to organize and present the plan. | NA | NA |
| | Resource List | Links and resources to hand out or use selectively. | NA | NA |

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|--------------------------------------|-----------------|--|-----------------|--|
| IMPLEMENTING A STRATEGIC PLAN | Video | This video https://youtu.be/GfnBfHAcAgI outlines how to implement a strategic plan including follow through and uses. Examples of how the plan is used by the ED, staff, and Board are provided. | 8 – 12 minutes | Internet connection |
| | Dialogue Guide | This Guide includes facilitated discussion of using Strategic Plan empower the Board to build community support and awareness of the organization, an exercise for developing a Mission-Focused Board Agenda, and examples of how the plan can generate SMART goals for both staff and Board. | 10 – 15 minutes | HOs: <i>Mission-Focused Board Agenda Template</i> (Indiana Nonprofit Resource Network); and <i>Strategic Planning -Keeping Your Objectives SMART</i> |
| | FAQ | This FAQ includes information on how to use the Strategic Plan in several ways to strengthen the organization including more effective Board agendas, and includes an outline of SMART Goals. | NA | NA |
| | Resource List | Links and resources to hand out or use selectively. | NA | NA |
| EVALUATION | Evaluation Form | Here is the Survey Monkey link for participants in all or part of Tool Kit #6 https://www.surveymonkey.com/r/ToolKit6Eval . We would appreciate the feedback. We have also provided a hard copy Evaluation Form to use with participants if you prefer. | NA | NA |