



Syllabus for Virtual Series: Facilitating Strategic Planning (May - June 2016)

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Purpose of this Document

This Syllabus is an easy-to-reference guide that combines all of the necessary guidelines and procedures to progress through the Series. Thus, it includes some information that is also on the web pages for this Series. We recommend that you bookmark the link to the Syllabus or print it for your reference. The Syllabus is online at <http://www.consultantsdevelopmentinstitute.org/webinars/series/FSP/syllabus.pdf>

Audiences

Ideal Audiences for the Series – Highly Motivated, Self-Directed Learners

In traditional educational programs, faculty, fees and grading can help to motivate learners through the programs. However, in online learning programs like this Series, learners must be highly motivated and self-directed to truly excel in the programs.

This Series is also designed especially for the following types of learners:

1. Facilitators, planners and members of organizations who seek to:
 - Customize and facilitate the best strategic planning process in any type of organization
 - Be truly professional by knowing several models of strategic planning
 - Gain a large number of highly practical tools about all aspects of strategic planning
2. Organizations in these situations:
 - Have very limited resources for extensive planning and implementation
 - Have not done strategic planning before or have done planning, but were not satisfied with the results
 - Have highly unique nature and needs, and thus require a highly customized planning process.

Self-Assessment to Help You Decide Whether to Enroll

Are you unsure whether to enroll? We want to be sure that this Series will be of tremendous value to you, so please take this brief strategic planning facilitation assessment. If the assessment is not challenging to you because of your current level of expertise, then the Series is probably not of value to you. See

<http://www.consultantsdevelopmentinstitute.org/webinars/series/FSP/skills-assessment.pdf>

Overview of the Series

Purpose of the Series

The purpose of the Series is to spread the core knowledge and skills needed to successfully facilitate strategic planning in any type of organization. The focus is especially on how to customize the planning process and to facilitate the necessary strategic thinking to produce a Strategic Plan that remains highly relevant, realistic and flexible.

What You Can Learn

From implementing the guidelines and tools in this Series, you can:

1. Explain the purposes and benefits of strategic planning to leaders and planners.
2. Equip planners to customize the best planning process for the nature of their organization and the purpose of their planning.
3. Plan the necessary group structures and processes to facilitate for maximum participation, collaboration and engagement of all of the planners.

4. Gain the strong buy-in and commitment of all of the planners in their process and Strategic Plan.
 5. Reference numerous techniques in facilitation to guide and support the planners during their robust strategic thinking and planning.
 6. Guide planners to consider the most significant trends, inside and outside of their organization, to identify the most important strategic priorities to include in their Plan.
 7. Show planners how to use at least one practical framework to identify the most useful strategic priorities based on their strategic thinking and discussions.
 8. Support planners to clarify the critical success factors in planning, and the core competencies and unique value proposition for their organization.
 9. Ensure planners' action plans are highly aligned, integrated and realistic for maximum effect and efficiency in their organization.
 10. Show planners how to develop an easy-to-reference Strategic Plan document that contains all of the most beneficial components needed in a Plan.
 11. Explain how planners can customize the communication of their Plan to each of their different groups of stakeholders.
 12. Overall, ensure their strategic planning remains relevant, realistic and flexible.
- (This Series does not include guidelines and resources about filings to legally form an organization.)

What is Success in the Series? That Depends on Your Goals In It

Success in the Series is different for different people depending on their expectations and learning styles. For example, some people are gatherers – they quickly go through the courses and then leave, so you might never notice them in the Series. Similarly, others are loners – they might carefully dig deep into the videos and the handouts, but they prefer to learn alone, and so you might never notice them either. Some are problem solvers – they are there especially to solve problems for themselves and others. Some are networkers – they join primarily to learn and share with others. You might frequently notice problem solvers and networkers in the online discussion forums. Which type are you?

Overview of Diverse Methods for Learning

This Series uses a state-of-the-art, diverse approach to learning with resources that you can easily access at any time during the Series. Faculty have extensive experience in strategic planning and in teaching how to facilitate the planning.

You complete five online core courses about all aspects of facilitating strategic planning, and you participate in online discussion forums with faculty and other participants. The courses are listed in the “Course Schedule” in this document.

Courses and numerous downloadable tools guide you, step by step, to draft your complete, customized, sample Strategic Plan that includes all of the most important components in a Plan that remains relevant, realistic and flexible.

Concurrently, you reflect and document your learning in your private Learning Journal, and use CDI's Learning Management System to access hundreds of free, online articles about facilitating strategic planning.

You can choose the pro bono Audit Track or the fee-based Certificate Track. (See “Types of Enrollment” in this document.)

More information is available on the home page of the Series at <http://www.consultantsdevelopmentinstitute.org/webinars/series/facilitating-strategic-planning.htm>

Numerous Downloadable Tools to Apply

Videos give instructions for using all of these tools. The tools are adapted from Authenticity Consulting's publications about strategic planning. See <http://AuthenticityConsulting.com>.

Facilitation Group Decision-Making and Problem-Solving

- How to Draft a Basic Contract for Facilitation
- When to Facilitate, Train or Coach
- How to Acculturate Groups
- How to Design Groups for Successful Facilitation
- Basic Guidelines for Effective Meeting Management
- Common Techniques in Facilitating
- How to Enhance Participation in Groups
- How to Achieve Group Consensus in Decisions
- How to Intervene in Groups
- How to Manage Conflict in Groups

Overview of Sensible Strategic Planning

- An Overview of Sensible Strategic Planning
- Eighteen Tips to Enhance Your Strategic Planning
- Comparison of For-Profit and Nonprofit Strategic Planning
- Glossary of Strategic Planning Terms

Customizing Your Strategic Planning Process

- Template to Customize Your Strategic Planning Process
- How to Ensure You Are Really Ready for Strategic Planning
- How to Organize Your Strategic Planning Committee
- How to Ensure Your Board is Involved in Strategic Planning
- How to Select the Best Model for Your Strategic Planning
- How to Plan the Facilitation Role
- How to Match Your Strategic Planning to Your Cultures
- How to Train Planners About Their Strategic Planning Process
- How to Get Strong Buy-In to Your Strategic Planning
- How to Budget for Your Planning

Deciding Your Strategic Priorities

Clarifying Your Strategic Purpose

- Adaptable Template for Documenting Your Strategic Plan
- Common Techniques in Facilitating Strategic Planning
- How to Plan Your Mission, Vision and Values Statements
- How to Develop Your Mission, Vision and Values Statement

Analyzing Your Situation

- How to Take a Wide Look Outside Your Organization
- How to Take a Good Look Inside Your Organization

Selecting Your Strategic Priorities

- How to Decide Your Most Important Strategic Priorities
- Useful Strategic Goals to Develop Your Organization
- Useful Actions to Survive Tight Times

Making Assignments and Monitoring Your Strategic Plan

Developing Your Action Plans

- How to Write Accurate and Useful Action Plans
- How to Conduct a Reality Check of Your Action Plans

Writing Your Plan Document

- How to Draft a Financial Plan from Your Strategic Plan
- How to Write Your Strategic Plan Document
- How to Ensure Your Strategic Plan Document is Complete

Implementing Your Plan

- How to Ensure Your Strategic Plan Will Be Implemented
- How to Communicate Your Strategic Plan
- How to Monitor, Evaluate and Change Your Strategic Plan

Course Schedule

You must complete the Series within the eight-week period of this term. The deadline to complete the Series is specified below. Faculty participate in the online discussion forums primarily during the current course in the Schedule below. If you are on a Certificate Track, then your Journal for a course must be submitted within one week after the end of the course per the date below.

(The deadlines mentioned below refer to the end of that day (12:00 a.m., Central Time zone, or GMT-6).

Start of enrollment period for this term	May 2
Course 1: Facilitating Group Problem-Solving and Decision-Making (See Note 1)	May 23
Deadline to enroll in the Series	May 29
Deadline to transfer from the Audit Track to the Certificate Track	May 29
Course 2: An Overview of Sensible Strategic Planning	May 30
Course 3: Customizing Your Strategic Planning Process	June 6
Course 4: Deciding Your Strategic Priorities (See Note 2)	June 13
Course 5: Making Assignments and Monitoring Your Strategic Plan	June 20
Deadline to submit “Template to Customize ... ” (for Certificate Track)	June 30
Deadline to submit the sample Strategic Plan (for Certificate Track)	June 30
Deadline to complete the Series	June 30
Deadline for faculty to grade the Template and Strategic Plan	July 15

Enrollment Types and Process

Audit Track – Pro Bono, Unlimited Enrollment (Individual Participation)

Participants get complete access to all aspects of the Series, including the courses, materials and online forums with other participants and faculty. To enroll in individual participation in this Track:

1. Submit the application for this term by the end of the enrollment period in the “Course Schedule.” See <https://www.surveymonkey.com/r/spf-May-June-2016>
2. If you are selected for this pro bono Audit Track, then CDI will create your account in the Learning Management System during the enrollment period, and notify you about how you can promptly start the courses.

Certificate Track – Fee-Based, Unlimited Enrollment (Individual Participation)

Enrollment in this Track is unlimited. Participants can earn a “Certificate in Facilitating Strategic Planning” by earning sufficient grades in the assignments and paying the \$225 fee for faculty to grade them. *This is essentially a two-day workshop for this very low fee.* (See the “Requirements and Grading for the Optional Certificate Track” section in this document.) To enroll in individual participation in this Track:

1. Create your account in CDI's Learning Management System, if you have not done so already. See <http://www.consultantsdevelopmentinstitute.org/moodle/>
1. Go to the Series to pay the fee. (Scroll to the bottom of the page.) <http://www.consultantsdevelopmentinstitute.org/moodle/course/view.php?id=62>
2. You can access courses on the right side of the pages in your account in the LMS.

Certificate Track – Fee-Based Enrollment (Peer Learning Group Participation)

Peer support and accountabilities can almost guarantee your complete participation and learning during the Series. You might participate in a cohort of fellow learners in the Series if you are a member of an organization that collaborates with CDI to provide the Series. See “How to Collaborate With CDI to Offer Strategic Planning Training to Your Constituents” at <http://www.consultantsdevelopmentinstitute.org/webinars/series/FSP/collaborate-spf-how-to.pdf>

Learning Management System

CDI’s online Learning Management System (LMS) includes all of the courses and associated materials needed for this Series, as well as the step-by-step guidelines to use them. It also includes links to hundreds of free, online resources about facilitating strategic planning. You start by creating your private account in which you manage your activities through the Series. From that account, you proceed through the Series.

How to Create Your Account in CDI’s Learning Management System

(CDI creates the accounts for participants in the Audit Track. They do not need this procedure.)

It will take you about 10 minutes to do the following procedure.

1. Go to the page in the LMS to create your account:

<http://www.consultantsdevelopmentinstitute.org/moodle/login/signup.php>

2. Fill in the requested information to create your account. An email will automatically be sent to you, to verify your account creation.

NOTE: write down the username and password that you chose, so that you do not forget them.

3. Click on the web address in that automated email. Then you will see a new Web page with the phrase “Your registration has been confirmed”.
4. Click on “Home” on that Web page. Then you will be taken back to the LMS home page.

How to Modify Your Profile

You can edit your profile to personalize your preferences, for example, to add a picture of yourself, your web site, and any additional information about you. That kind of information tends to get more people to interact with you during the Series. To edit your profile:

1. In the “Administration” section on the left side of the page,
2. Click on “My profile settings”.
3. Click on “Edit profile”.
4. See the types of information that you can enter or modify on that page.

How to Enroll in Each of the Courses in the Series

Your enrollment in the Series “Facilitating Strategic Planning” automatically enrolls you in each of the five courses in the Series.

Online Discussion Forums

You can greatly expand and deepen your learning in this Series by taking part in the online discussion forums. In the forums, you share questions, answers, suggestions and materials with other participants and faculty during the Series. You can access the forums any time of the day.

Your enrollment in the Series automatically enrolls you in all of the forums. You will receive one daily email digest that includes any posts and replies in the forums over the past 24-hour period. You can modify your preferences for how you receive those emails. Faculty are active *primarily* in the forum for the current course in the “Course Schedule”. **NOTE:** We strongly encourage you to *not* unsubscribe from these forums as they regularly include very practical tips about strategic planning.

Ground Rules for Participation in the Forums

NOTE: Use of the forums in this Series automatically assumes that you have agreed to all of the following ground rules.

1. **See the video about the course before you post** – The video very likely answers your question, in addition to providing a lot more information about it.
2. **Read previous posts about your topic** – If you plan to ask a question in a forum about a certain topic, then read any previous posts about that topic in that forum. Use the “Search” box to find any information about your topic.
3. **Use meaningful subject lines** – Forums ask you to include a subject line when posting. The more descriptive that line, the more likely that readers can choose to read your posting in a forum.
4. **Write clearly and concisely** – Remember that other participants’ primary language might not be the same as yours.
5. **Maintain confidentiality** – Remember that many other people might be reading your posts, so be careful about sharing personal information, such as phone numbers and email addresses.
6. **Ask for help** – That is one of the most important skills in strategic planning. (Your questions are probably in the minds of the other students, too.)
7. **Offer useful resources** – For example, remind others about a certain handout in the current course.
8. **Do not openly promote your services** – Your first obligation is to help and support your fellow students to maximize their learning in the Series.
9. **Be patient!** – Remember that the forums include people with many different priorities and interests than yours, so they might not respond right away. The forums are not the same as a classroom with a trainer; rather they are more like social networking sites.

How to Use the Forums

1. You must be logged in to the LMS to use the forums. The forums are located at the home page of the Series, at <http://www.consultantsdevelopmentinstitute.org/moodle/course/view.php?id=67>

To Post to a Forum

1. Click on the name of the forum.
2. Click on "Add a new discussion topic".
3. Enter a concise and meaningful title in the “Subject”.
4. Enter your comment in the “Message” section.

5. Click on the "Post to forum" to post your comments. You can edit your comment for up to 30 minutes.

To Reply to Another's Comment

1. Click on the name of the discussion.
2. Click on "Reply" link at the bottom right of the discussion. Then the above procedure is the same as posting to a forum.

How to Receive Email Notifications from the Forums

In your profile in your account in the LMS, you can select to get an email whenever there is a comment in any of the forums or you can get one email a day with all of the comments. You can also select whether you get the entire comment or just the first line or two of the comment. You can make your selection by using the following procedure:

1. Click on "Administration" on the left sidebar.
2. Click on "My profile settings".
3. Click on "Edit profile".
4. Click on the "General" pulldown to the right.

Find the "Email digest type" pulldown, and the "Forum auto-subscribe" and "Forum tracking".

How to Get the Most Out of the Series

Understand This Series Versus Traditional Classrooms

The nature of this Series is not the same as that of a typical classroom. As previously mentioned in this Syllabus, self-motivated and self-directed learners can flourish in the Series. So, the more that you can sustain those traits during this Series, the more learning that you will accomplish.

Another trait that is extremely useful in programs like this Series is the ability to ask for help among your fellow participants. The more that you participate in the forums with your questions, answers and resources, the more you will learn during this Series.

Please be patient with getting answers to your questions, as the number of faculty who can respond to the large number of participants (including in the pro bono and fee-based Tracks) is limited.

General Guidelines to Maximize Your Learning

1. **You will get out what you put in** – Maximize your learning in the Series by doing all of the courses, the post-assessment quizzes, downloading all of the handouts, reflecting in your Journal and taking part in the online discussion forums.
2. **Use regularly scheduled study hours** – Students who have been most successful in online programs are those who have regularly followed specific study hours, rather than "trying to fit it in somehow".
3. **Do not fall behind** – It can be a challenge to maintain motivation in a program where faculty members are not regularly helping to motivate you. If you fall behind, the effort to catch up just keeps increasing.
4. **Participate in the online forums** – You might learn as much from other participants as from faculty. Participation with others will also greatly help to maintain your motivation in the Series.

5. **Draft your customized, sample Strategic Plan as you go through the courses** – The 4th and 5th courses in the Series will share specific guidelines and resources to use an adaptable template to complete your customized, sample Strategic Plan.
6. **Discuss the videos with others** – Do not share your CDI username and password, but you can have others watch it with you and then discuss it.
7. **Share the handouts from the courses** – You can share them with others in your organization or with clients that you are serving. Do not remove the copyright or sell the handouts.
8. **Collect the handouts and PowerPoint slides during the Series** – A handy way to ensure that you remember your accumulated learning during the Series is to reference the list of all of the handouts in the Series. (See the section “Numerous Downloadable Tools to Apply”.) Also, collect a packet of all of the PowerPoint slides from the courses. The slides are available in the handouts from each course in the LMS.

There are also many good suggestions in the article “25 Tips to Make the Most Out of a MOOC” at <http://www.onlinecollege.org/2012/08/21/25-tips-make-most-mooc/>

Find a Study Buddy?

Research suggests that students are more motivated and fulfilled during online courses when they do the courses with others – with study buddies. For example, in this Series, you would benefit from watching the video with others and then discussing what you have seen. Each course includes sources for additional learning that you could do with others. Also, you could discuss how each of you is customizing your strategic planning process, and what you will include in your sample Strategic Plan.

Perhaps the best way to find study buddies is to find them before you enroll in the Series, so you can start and finish the Series together. Talk to your colleagues and peers or to others in your organization. See the “Find a Study Buddy” service http://www.mooclab.club/pages/study_buddy/

Involve the Strategic Planning Committee?

The role of the Strategic Planning Committee is to ensure a high-quality strategic planning process – not to put the content into the Strategic Plan and then ask the Board to approve it. Instead, all Board members should be involved in the strategic thinking and discussions to generate the content of the Plan.

So the role of the Committee members in organizations that you work with, is very closely aligned with your role as the facilitator of their strategic planning process, whether you are a member of their organization or not. Thus, Committee members could benefit greatly from participating in all, or parts, of the Series with you. Your participation with each other could create tremendous motivation for all of you, as well.

Requirements and Grading for the Optional Certificate Track

The requirements are for the Certificate Track. You can proceed through the courses at your own pace during this term of the Series. However, you must complete the Series within the eight-week period of this term. It requires approximately 13 hours to meet all of the requirements for the Certificate during the term. However, the Journal for a certain course is due within one week after that course ends per the Course Schedule. The Journal is graded by faculty within 14 days of the end of that course.

Many Benefits of Getting the Certificate

You can select the Certificate Track to earn the “Certificate in Facilitating Strategic Planning” during the Series. Reasons to earn the Certificate include:

1. To verify your increased knowledge and skills in facilitating strategic planning.

2. To enhance your credibility among your peers and clients.
3. To increase your confidence in using your new abilities in facilitating strategic planning.
4. To increase your marketability in the increasingly competitive field of strategic planning.
5. To have a valuable professional goal to sustain motivation during the Series.
6. The activities to maximize your learning during the Series are the same activities needed to earn the Certificate anyway.
7. It is unlikely that you would ever find a Certificate program as highly accessible as this Series.
8. Research shows that people are much less likely to complete a self-directed, online program if they do not have some financial commitment to the program.
9. In this Series, faculty share feedback to the Journals and Strategic Plans provided by the participants in the Certificate Track.

Paid the Fee for the Series

1. The fee is \$225. The deadline to enroll in the Certificate Track is the last day of the first course per the "Course Schedule". The fee can be refunded before the end of the first course if you decide to withdraw from the Series or transfer to the Audit Track. (See "How to Enroll in the Series".)

Received Passing Grades on Quiz and Learning Journal for Each Course

1. You watched the video.
 - a. Grading – You answered at least 80% of the video's post-assessment questions accurately.
2. With your Learning Journal:
 - a. You wrote at least a 150-word response to the "Pause for Reflection" slide in the video.
 - b. You wrote at least a 150-word essay to summarize and synthesize your learning from the video.
 - c. Grading (pass/fail):
 - i. Your reflection in your Journal showed thoughtfulness and clarity in applying the content of the course to your own situation and/or strategic planning.
 - ii. Your summary and synthesis closely integrated many of the topics in the content of the course.
 - iii. You submitted your Journal within one week after the end of the course.

This requires approximately 1.5 hours per course, or a total of 7.5 hours during the Series.

Received Passing Grade on Capstone Project: Sample Strategic Plan

1. During the 3rd course, "Customizing Your Strategic Planning Process", you completed the Template to customize a strategic planning process. That 3rd course specifies how to complete the Template.
2. During the 4th and 5th courses, you completed, a customized, sample Strategic Plan according to the best practices specified in those two courses.
3. You provided the Template and the sample Strategic Plan to faculty before the end of the Series as specified on the Course Schedule.

Grading (pass/fail) – The purpose of this capstone project is to demonstrate your understanding of the best practices in developing a relevant, realistic and flexible Strategic Plan. The purpose is not

necessarily to develop a Strategic Plan for your own organization. Thus, you might need to do the sample Plan for an imaginary organization, in order to meet the timing of the assignments for this Series. Faculty will assess the quality of your sample Strategic Plan based on how well you implemented the best practices that were specified in the 4th and 5th courses. The Template and Plan will be graded within 14 days after the end of the term.

The capstone requires approximately 5.5 hours during the Series.

Legal Notices, Policies and Terms

By using any of CDI's services and resources, you acknowledge that you will abide by CDI's Legal Notices, Policies and Terms. See <http://www.consultantsdevelopmentinstitute.org/legal.htm>

To Share Feedback and Contact CDI

We greatly appreciate feedback to continually improve this Series. If you have any questions, suggestions or other comments, then please email us at info@ConsultantsDevelopmentInstitute.org . We respond to this email address during regular business hours, Central Time Zone, in the USA.

Revisions

The content of this Syllabus applies specifically to the February – March 2016 term. Revisions of the Syllabus should be tracked by the date in the upper right corner.