



CONSULTANTS
DEVELOPMENT
INSTITUTE

Syllabus for Facilitating Strategic Planning in Nonprofits

- Program includes nine virtual Modules that participants and faculty schedule ahead of time
- Each module includes:
 1. 1-2 hours of assigned readings from the text and other supplemental materials
 2. 90-minute virtual seminar with faculty and learners to discuss highlights from the readings and to address questions from learners
 3. 90-minute virtual peer coaching with faculty and learners to coach each learner on applications of the content
- Each learner participates in an ongoing private email exchange with faculty and fellow participants
- Each learner documents ongoing learning and actions in the learner's Learning and Development Journal
- Program meets part of the requirements for "Certification in Facilitating Strategic Planning in Nonprofits"
- For more information about this program and certifications, see ConsultantsDevelopmentInstitute.org
- Each of the following topics is presented in the context of facilitating in a nonprofit organization

Module #1 – Intro to Program

Pre-Readings and Reflections

Overview of Program
Overview of Peer Coaching Process

Meeting Activities

Introductions to faculty and learners
Team building among learners (as required)
Review of program agenda and materials
Overview and practice of peer coaching groups
Practice using distance learning technologies
Description of pre-reading before Module #2
Schedule all future seminars and peer meetings

Module #2 – Understanding Strategic Planning

Strategic Planning

What Is Strategic Planning? "Strategic"?
All Flows from Strategic Planning
Benefits of Strategic Planning

About Conducting Strategic Planning

Strategic Planning Framework
Traits of Strategic Planning Process
Myths About Strategic Planning
Criteria for Effective Planning and Plans
When to Do Strategic Planning

Module #3 – Foundations of Facilitation

Your Relationship With Planners

What Strategic Planning Facilitator Does
Understand Yourself As Facilitator
Understand Planners' Nonprofit
How to Work with Diversity
Get Agreement Between You and Planners
(this is Contracting phase of consulting process)

Techniques and Challenges

Procedures for Common Facilitation Techniques
How To Enhance Group Participation
How To Manage Conflict and Resistance
How to Come to Consensus

Module #4 – Preparation for Planning

What's Real Purpose for This Planning?
Client Ready for Strategic Planning?
What Learned in Previous Planning?
Who's On Planning Committee?
Scope of Plan? Timespan of Plan?
Which Planning Model to Use?
How Make Decisions During Planning?
How Get "Buy In" to Plan?
How Ensure Implementation?
How Train Planners?
(this is Discovery and Action Planning phases of consulting process)

Module #5 – Strategic Analyses

External Analysis

Environmental Trends?
Stakeholder Analysis? Clients?
What Opportunities and Threats?

Internal Analysis

Quality of Board and Management Functions?
Quality of Each Program? Processes? Outcomes?
What Strengths and Weaknesses?

Module #6 – Setting Strategic Direction

Strategic Thinking and Strategizing

Ensure Continued Strategic Thinking
Discuss Different Models of Strategic Analyses
Consider Different Models of Strategizing
Decide Best Strategies to Follow

Setting Strategic Direction

Clarify Purposeful Mission as Compass
Articulate Vision for Nonprofit and Clients
Itemize Values for Ongoing Direction
Establish Goals Based on Analyses

Module #7 – Action Planning and Plan Document

Action Planning

Develop Action Plans for Each Goal
Integrate, Align and Reality-Check Actions
Develop Subordinated Plans
Develop Operating Budget

Develop Strategic Plan Document

Draft Strategic Plan Document
Coordinate Reviews and Approval
Distribute and Communicate Strategic Plan
Celebrate Completion of Plan

Module #8 – Implementation and Change Management

Support Client With Implementation of Plans?
Ensure Leadership, Supervision and Delegation
Support Client to Managing Change?
Approaches to Ensure Ongoing Implementation
Tools To Track Status and How to Use Them
Systematically Adjust Plans As Needed

Module #9 – Project Evaluation and Termination, and Closing CDI Program

Project Evaluation and Termination

Evaluate If Project Achieved Desired Results
Identify Next Steps for You and Client
Formalize Termination of Project
(this is Evaluation and Termination phases of consulting process)

Closing This CDI Program

Sharing reflections from each learner
Coaching each member to identify next steps
Commitments among members for the future
Presentation of certificates and certifications
(discussion instead of Peer Coaching Group)

Although all learners should read all topics, different learners might choose to be coached on different topics in their peer coaching groups. Learners might choose topics that are currently very interesting to them or that they are applying in their consulting activities – *this is the essence of just-in-time learning.*