

Strategic Planning Fundamentals

November 2 - 26, 2012

Course Outline

Facilitator: Dr. Dominique Giguère, B.Sc., B.Ed., Ph.D.

Overview:

This course allows participants to explore the fundamental components and best practices in the use and development of a strategic plan. By the end of the course, learners will have an appreciation for and will be able to maximize the value of a strategic plan in their personal practice, within their team and within their department or institution. In keeping with the philosophy of the College Management 101 program, the discussions will be set in the Ontario College context and will use a hands-on approach to real issues confronted by college administrators. Participants will use their learning to create a new or edit an existing strategic plan including vision, mission, values and goals. They will also gain insights related to implementation, communication, tracking and assessment issues.

Although not a pre-requisite, this course will build on some of the concepts explored in Introduction to Strategic and Business Planning. Participants who did not complete this course will be provided with two additional required readings related specifically to strategic planning theory and the Ontario college planning framework.

Full module outlines will be available online at www.ocasa.on.ca/certification.

About the instructor:

Dr. Dominique Giguère, B.Sc., B.Ed., Ph.D.

Dominique Giguère is an experienced organization development consultant with deep, first-hand experience in strategic and business planning, organizational change and culture, learning and performance management. As consultant and co-founder of Currents Group Inc. since 2001, she regularly provides strategic and business planning services to a broad range of organizations.

Her expertise in the post-secondary sector is anchored in thirteen years of involvement in the college system where she has acquired a sound knowledge of the colleges' planning environment and context. This well-rounded understanding comes from the various positions she has held, including professor, faculty development consultant, director of professional development, director of organizational effectiveness, eLearning and instructional designer and organizational development consultant lead on provincial projects: Lifelong Learning Challenge Fund (LLCF) and Colleges Integrating Immigrants to Employment (CIITE) respectively. Her doctoral studies were also conducted in the college sector and focused on support staff.

Her expertise and talent in strategy and planning were recognized as she co-chaired the provincial College Committee on Human Resources Development as well as co-founded and co-chaired the Canadian Society for Professional and Organizational Development. She is currently under contract with Fanshawe College to facilitate the development of their strategic plan, including vision, mission and values.

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This course allows participants to explore the fundamental components and best practices in the use and development of a strategic plan. By the end of the course, learners will have an appreciation for and will be able to maximize the value of a strategic plan in their personal practice, within their team and within their department or institution. In keeping with the philosophy of the College Management 101 program, the discussions will be set in the Ontario College context and will use a hands-on approach to real issues confronted by college administrators. Participants will apply their knowledge of the components and the methodology to create a new, small scale plan or to edit an existing, more complex strategic plan, both including vision, mission, values and goals. They will also gain insights related to implementation, communication, tracking and assessment issues.

If you have been part of strategic planning process, this is your opportunity to “look under the hood”, and to also pull the curtain behind the facilitator to better understand the methodology for the development of a plan and the mechanics of its various components. This will enable you to enhance your contribution to the development of a plan in the future, improve existing plans and improve your use of strategic plans in general.

Although not a pre-requisite, this course will build on some of the concepts explored in *Introduction to Strategic and Business Planning*. Participants who did not complete this course will be provided with two additional required readings related specifically to strategic planning theory and the Ontario College Planning Framework.

Recommended books: The concepts, methodology and exercises used in this course have been customized by Dr. Giguère, through her consulting practice and experience in working with various strategic planning tools. However, the main theoretical framework presented has been influenced by the writings of Richard Barrett and Patrick Lencioni. Consequently, the following books are highly recommended:

Liberating the Corporate Soul: Building a Visionary Organization by **Richard Barrett**, Butterworth-Heinemann (1998)

The Advantage: Why Organizational Health Trumps Everything Else In Business by **Patrick Lencioni**, Jossey-Bass (2012)

Module	Learning Outcomes <i>Participant should demonstrate the ability to:</i>	Learning Activity	Learning Resources	Learning Demonstration
Module 1 Strategic Planning: What, why and how	Describe the content and components of a strategic plan. Differentiate a strategic plan from other types of planning documents.	Search, locate, review, post and comment on an existing strategic plan. Participate in online discussions and debate. Locate resources/ cases / examples in support of opinion or idea. Identify a relevant area for strategic planning in their personal or professional life.	Sample Strategic Plans: examples of good practices... and not so good ones! <i>Readings: will consist of a variety of journal articles, web links, videos and / or textbook chapters.</i> <i>All learning resources will be provided electronically and posted by facilitator or students) on the LMS course site.</i>	Post example of strategic plan with comments on components and key differences between various plans. Contribution to discussion board prompted by facilitator (minimum one post). Critical analysis in discussion: pros and cons of planning, good and poor uses of strategic plans, (minimum one comment / rebuttal to someone else's post)
		Getting to know one another – Online introductions and networking.		Assignment: Provide (submit and post) introductory profile, expectations of the course, and selection of area for planning, with rationale.
Module	Learning	Learning Activity	Learning Resources	Learning Demonstration

	Outcome			
Module 2 Components of a Strategic Plan Part I: Vision, Mission and Values	Describe the characteristics of value statements and how to select values for groups or organizations.	<p>Complete values selection exercise.</p> <p>Explore, discuss process for identifying the values of a group.</p>	<p>See note above re: Readings.</p> <p>Examples of values, vision and mission statements will be contributed / posted by participants and course facilitator.</p>	Submit new or edited values selection for the person / department / organization selected in module 1.
	Describe the characteristics of a vision statement.	<p>Find, review, comment on good and “poor” statements.</p> <p>Develop a mini guide or checklist to writing a vision statement.</p>		Assignment for half the group: Post examples, post mini guide and answer questions from the other half.
	Describe the characteristics of a mission statement.	<p>Find, review, comment on good and “poor” statements.</p> <p>Develop a mini guide or check list to writing a mission statement.</p>		Assignment for half the group: Post examples, post mini guide and answer questions from the other half.
	<p>Write or edit a strategic plan part I: values, vision and mission.</p> <p>Explore, appreciate, utilize a structured methodology to the development of values, vision and mission statements.</p>	<p>Complete 4 quadrant exercise.</p> <p>Participate in webinar / live chat / teleconference to discuss each others’ 4 quadrant submissions and get feedback.</p> <p>Write / edit and submit strategic plan part I: values, vision, mission</p>	Four quadrant template.	Submit strategic plan part I: values, vision, mission.

Module	Learning Outcome	Learning Activity	Learning Resources	Learning Demonstration
	Identify and articulate goal statements and measures.	How to write SMART Goals: practice “fixing” poorly written goal statements.	See note above re Readings. Exercise / Critical questions template. Strategic Goal mapping template.	Submission: edited goal statements.
	Apply a structured methodology to identify strategic goals.	Complete “critical questions” exercise to identify strategic goals and measures.		Submission: written strategic goals and measures
		Assemble strategic plan. Participate in webinar / live chat / teleconference to obtain feedback, ask questions about plan.		Submission of final strategic plan.
	Create implementation plan with consideration for tracking, assessment and communication.	Collectively create a checklist for implementation.		Participation in the creation of checklist (minimum one post).