REIMAGINED STRATEGIC PLANNING

Your board. Your ideas. Your plan.

4-WEEK STANDARD | PARTICIPANT SYLLABUS

Eight learning steps • Three consensus checkpoints • Fully online and asynchronous

The same learning experience and deliverables in both formats; only the pace changes. All deadlines are measured from your confirmed start date.

01 GET GROUNDED. GET CLEAR.

STEP 1
DAYS 1–3

Getting Grounded

Understand strategic planning, participant roles, and the organization's current situation.

ASSIGNMENT **Getting to Know You and Your Organization**

Describe your role, strengths, challenges, and hopes for the planning experience.

DUE **Day 3**

STEP 2
DAYS 4–6

Understanding Our Scope

Clarify the board's control, influence, and desired impact.

ASSIGNMENT **The Three Circles — Understanding Scope**

Identify what the board controls, where it can influence others, and the impact it hopes to create.

DUE **Day 6**

✓ **CONSENSUS CHECKPOINT 1** **DAY 6 | Our Scope and Direction**

Do we share an understanding of planning responsibilities, scope, and direction? Review the consolidated responses; indicate support, concerns, or proposed changes.

02 DREAM BIG. THINK FORWARD.

STEP 3
DAYS 7–10

Imagining Our Outcomes

Imagine meaningful future accomplishments and their impact.

ASSIGNMENT **Summary of Outcomes**

What would you want to read about the organization in a future annual report?

DUE **Day 10**

STEP 4
DAYS 11–14

Establishing Our Goals

Define the broad areas of focus needed to achieve desired outcomes.

ASSIGNMENT **Goals Worksheet**

Identify what needs to happen; consider governance, operational, and shared responsibilities.

DUE **Day 14**

✓ **CONSENSUS CHECKPOINT 2** **DAY 14 | Our Outcomes and Goals**

Which outcomes and goals can we support as our strategic direction? Review the consolidated responses; indicate support, concerns, or proposed changes.

4-WEEK STANDARD / CONTINUED

03 MAKE CHOICES. FIND COMMON GROUND.

STEP 5 **DAYS 15–18**	**Developing Objectives** Translate goals into measurable progress. **ASSIGNMENT** **SMART Objectives** Write specific objectives tied to the proposed goals. **DUE** **Day 18**

STEP 6 **DAYS 19–22**	**Making Choices — Think or Act?** Match ambitions with realistic capacity and priorities. **ASSIGNMENT** **Think/Act Tank Worksheet** Select objectives to Act Now; retain other promising ideas in the Thinking Tank. **DUE** **Day 22**

✓ **CONSENSUS CHECKPOINT 3** **DAY 22 | Our Strategic Priorities**

Which objectives will we act on now, and which belong in the Thinking Tank? Review the consolidated responses; indicate support, concerns, or proposed changes.

04 MAKE IT HAPPEN.

STEP 7 **DAYS 23–26**	**Building Our Action Framework** Define strategies, responsibilities, measures, and next steps. **ASSIGNMENT** **Strategic Planning Worksheet — Action Framework** Document who does what, how progress will be assessed, and how the board will monitor implementation. **DUE** **Day 26**

STEP 8 **DAYS 27–28**	**Our Shared Direction** Review the draft plan and identify decisions reached and issues remaining. **ASSIGNMENT** **Final Strategic Plan Review** Affirm decisions that the board can live with; record unresolved items for future work. **DUE** **Day 28**

HOW THE CHECKPOINTS WORK

Participants review a shared summary and indicate whether they can support the proposed direction, have concerns, or cannot support it as written. The facilitator organizes responses and any refinements. Unresolved issues are documented—not treated as approved decisions.

WHAT YOU RECEIVE

An editable strategic planning document • Planning Journey • Action Framework • Thinking Tank • Tools for ongoing evaluation and refinement.

Final materials reflect the work completed and decisions reached during the scheduled experience. The board retains ownership of its decisions and direction.