CONSULTANTS DEVELOPMENT INSTITUTE

How to Collaborate With CDI to Offer Strategic Planning Training to Your Constituents

Description of the Training Program That You Could Operate and Provide

Collaborations to use CDI's online Series "Facilitating Strategic Planning" have been very valuable to learners and have generated revenue for collaborators, including for for-profits or nonprofits. Collaborations typically involve low overhead, as well. This low-cost Series spreads the core knowledge and skills needed to successfully facilitate strategic planning in any type of organization. The focus is on producing a Strategic Plan that is always relevant, realistic and flexible.

The Series uses a state-of-the-art "flipped classroom" approach in which cohorts of learners complete five, self-paced online courses (tutorials) and participate in peer coaching group (support and accountability group) meetings to enrich each course. Courses include an overview of sensible strategic planning, and how facilitate for full engagement of group members, customize the strategic planning process, cultivate strategic thinking and discussions, and ensure accountabilities for implementation of the Strategic Plan.

Each online course includes a pre-assessment, Learning Journal to capture learning and development, numerous practical tools to download, concise video/lecture, suggestions to additional learning, and a post-assessment to verify and affirm the learning from the course. Each course requires 1.0 to 1.5 self-paced hours to complete, or a total of 5.0 to 7.5 hours in the Series.

The facilitated peer coaching group meetings include equal time for each member in the cohort to get guidance and support from other members and the facilitator in order to enrich the content from the current course. Each cohort includes five members and each meeting is 1.5 hours long.

Participants Can Earn a "Certificate in Facilitating Strategic Planning"

Specific to this collaboration, the learner must answer at least 80% of the questions accurately in the post-assessment and also submit the Learning Journal for each course. The learner must also attend at least three (4.5 hours) of the scheduled five group meetings. This results in a requirement of at least 12.0 hours to earn the Certificate. The collaborator decides the scheduling of the courses and meetings. We suggest one course and meeting per week. The Series is described at http://bit.ly/1l1UVWj, and includes other forms of enrollment in the Series.

CDI's Role in the Collaboration

1. Train and support the collaborator and facilitator(s) in their start-up roles (itemized below). This typically requires three hours of CDI's time at the beginning of the collaboration.
2. Provide ongoing and reliable access to the participants' private accounts in the online Learning Management System (LMS) and to the five online courses and materials.
3. Provide a "Certificate in Facilitating Strategic Planning" to each participant who has met the requirements to earn the Certificate.

Collaborator's Role

1. Decide the fees to charge each group member.
2. Market the Series and the collaboration as a service to its constituents. In the marketing, recognize the Consultant Development Institute (CDI) as a collaborator or sponsor.

3. Recruit cohort members and potential facilitators. Facilitators need not have strong expertise in strategic planning, but should be comfortable in facilitating groups. (In nonprofits, volunteer facilitators also might do the courses and earn the Certificate for free.)
4. Organize cohorts of five members each, ideally with similar levels of experience.
5. Provide technology for phone-based group meetings, for example, a free phone bridge.
6. With CDI, verify each learner's completion of the requirements for the Certificate. (The Collaborator verifies attendance and the Journals. CDI grades the post-assessments.)

Facilitator's Role With Each Cohort

1. Support the cohort members to pre-schedule the one-hour orientation to the Series and the five 1.5-hour group meetings in the Series.
2. Conduct the one-hour orientation. Ideally, the orientation is face-to-face, if subsequent meetings are to be virtual. (CDI provides the talking points for the orientation.)
3. Ensure each learner submits a Learning Journal to the facilitator for each course. Some collaborators and/or facilitators might prefer that:
    a. The facilitator reviews the contents of each Journal and shares concise feedback with each member (a total of about one hour per meeting) and/or
    b. Each group member shares the highlights of their Journal with other members before the upcoming meeting.
4. Ensure the peer coaching group agenda is closely followed (see below).

Recommended Agenda for Each Peer Coaching Group Meeting (90 minutes)

Members prepare for each group meeting by identifying any questions, suggestions and resources to share about the current course in the upcoming group meeting.

1. Open with a brief check-in from each member (total of 5 minutes).
2. Ensure equal time for each member (presenter) to pose his or her questions, need for resources, etc., about the course (15 minutes per member). The facilitator:
    a. Calls on each of the other members to respond to the presenter.
    b. Ensures the presenter self-selects relevant and realistic action(s) to apply the current course's content in their personal life or work, for now or later on.
3. End the meeting with briefly:
    a. Rating the meeting with 1 as "very low" and 5 as "very high" (8 minutes).
    b. Verifying the date and time of the next meeting (2 minutes).

After a few meetings, members might prefer that the role of facilitator is rotated among members. Also, it is very useful if a consultant or client could briefly be involved at about mid-point in the Series to explain his or her application of strategic planning for cohort members to discuss.

Fee for CDI to Establish and Support the Training Program in the Collaboration

For nonprofits, CDI charges a one-time, start-up fee in the low $100s and an LMS account-management fee per cohort of less than $100. Fees can be negotiated based on the collaborator's nonprofit or for-profit status, mission and financial status. Do not judge the quality of the Series based on its low fees – our goal is to spread strategic planning skills, and not to maximize a profit.

Typical Procedure to Establish Your Strategic Planning Training

This procedure has been used several times to establish a successful strategic planning training program.

1. Collaborator assigns their personnel to review and implement this procedure.
2. They read:
   - This document that you are reading now, “How to Collaborate With CDI …”
   - Website for CDI’s Series “Facilitating Strategic Planning” at http://bit.ly/1l1UVWj
3. Conduct one-hour phone call with CDI faculty to review the Series, share questions, etc.
4. Collaborator gets management’s approval to offer the training to their constituents.
   - Decide the fee to charge cohort members (five members per cohort).
   - Make a proposal (a business case) to management to offer the training to constituents.
   - Get management’s approval.
5. Market the training program to constituents.
   - Get numerous, powerful testimonials from CDI.
   - Start a list of potential group members.
6. Recruit facilitators from the collaborator’s organization? Local professional organizations?
   - Draft a facilitator job description from this “How to Collaborate With CDI …”
   - CDI conducts one-hour, phone-based training and Q&A with facilitators.
7. Organize an initial one or two pilot cohorts of five members each.
   - Attempt to organize by similar levels of expertise (this is preferable, but not required).
   - Associate a facilitator with each cohort.
   - Send the proposed membership list to each member and facilitator.
8. Share information for CDI to establish the accounts in CDI’s Learning Management System.
   - Share members’ and facilitator’s names and emails addresses among themselves.
   - CDI establishes their accounts and provides information to each member and facilitator.
9. Facilitator conducts one-hour orientation to the training with each cohort.
   - CDI provides the talking points for the facilitator to use.
   - Facilitator shares CDI’s documents listed in item #2 above.
   - Schedule courses and five 1.5-hour cohort meetings (recommend do both per week).
10. Cohort members start going through the five courses according to the schedule of meetings.
    - For each course, they complete the post-assessment and submit their Learning Journal (either to the facilitator and/or to fellow group members).
11. Facilitator facilitates a 1.5-hour group meeting after each course.
    - The meeting agenda is included in this document “How to Collaborate With …”
12. Collaborator continues the marketing to build waiting lists for future cohorts.