



Cultivate Rural  
Community College Leaders

## Strategic Planning Facilitation Guide

**Purpose:** To lead your team through the transition from "Current Reality" to "Strategic Initiatives."

**Time Required:** 2–3 Hours

**Materials Needed:** Large whiteboard, situational analysis, river story, 3 different colors of sticky notes, markers, and small dot stickers for voting.

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### Phase 1: Setting the Stage (15 Minutes)

#### The Manager's Opening:

"In our situational analysis, we looked at the data. We know our key performance indicators, our resources, and more about the environment around us. Today, we aren't here to fix small problems; we are here to define where we want to be in 5 years. Remember the 'River Story'—we want to build a department that creates a better experience for our students. For today, assume we have the capacity to grow."

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### Phase 2: The Brainstorm (30 Minutes)

**Activity:** The "Sticky Note Dump"

1. **The Prompt:** Ask the team: *"Based on our situational analysis, what are the projects or initiatives we MUST take on to reach our 5-year vision?"*
  2. **The Rule:** One idea per sticky note. No critiquing at this stage.
  3. **The Action:** Have team members walk up and stick their notes on the board randomly.
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### Phase 3: Theming & Multi-Voting (45 Minutes)

**Activity:** Finding the Signal in the Noise

1. **Group Similar Ideas:** As a group, move the sticky notes into "clusters." For example, if you see notes about "Social Media," "Website," and "Brochures," group them under a header titled **Communication**.
  2. **The "Multi-Vote":** Give each team member 5 dot stickers.
  3. **The Action:** Tell them: *"Place your dots on the clusters you believe will have the highest impact on our students over the next 5 years. You can vote for 5 different themes or you can vote multiple times for one theme if it stands out more"*
  4. **Identify the Winners:** Look for the 3–5 clusters with the most dots. These are your **Strategic Themes**.
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### Phase 4: The Elevator Pitch (20 Minutes)

**Activity:** Building Buy-In

1. **Assign Leads:** Assign 1–2 people to each of the top 3–5 themes.
  2. **The Task:** Give them 10 minutes to prepare a 60 to 90-second "Pitch."
  3. **The Pitch Format:** \* *"This theme is [Name]. It is important because [Reason]. If we succeed, the student experience will change by [Outcome]."*
  4. **The Goal:** This ensures the team owns the vision, not just the manager. It also allows team members to 'sell' the theme they think will make the biggest impact.
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## Phase 5: The Gap Analysis (40 Minutes)

**Activity:** Building the Bridge

For each chosen Theme, draw a simple three-column chart on the board:

Current State (Where we are)	The Gap (What's missing?)	Desired State (5 Years out)
<i>e.g., Paper processes</i>	<i>Need digital signatures/software</i>	<i>100% Paperless</i>

**Facilitation Tip:** If the team gets stuck on "The Gap," ask: "What is the single biggest 'speed bump' preventing us from being at the Desired State today?" In addition, the projects that created the themes can be referred back to as gap fillers.

**Multi-vote (pt.2):** If there are too many gap projects, the team can do another multi-voting session to narrow down the most important projects, or you as the head can prioritize projects.

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## Phase 6: Wrap-Up & Ownership (10 Minutes)

### The Manager's Closing:

"We've moved from 100 different directions down to our Top themes. We have defined the Gap projects. Our next step is turning these 'Gaps' into a Project Plan. Between now and our next meeting, [Lead Name] will be the champion for [Theme Name] to start thinking about the specific steps we need to take."

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### Facilitator's Checklist:

- Did I stop people from "solutioning" too early during the brainstorm?
- Did I ensure the "quiet voices" in the room got to place their dots?
- Is every Strategic Theme aligned with the College's Master Plan?
- Do we have a clear "Champion" for the next phase?