

# STRATEGIC PLANNING

**Professional Standard Code(s):** 3200-Program Management, 4000-Communications and Marketing

**Key Areas:** 3230-Healthy School Environment (0.25 hr.), 4110-Strategic and Marketing Plans (0.75 hr.)

**Hours of Instruction:** 1

## PREPARATION

Supplies	Classroom Setup
<ol style="list-style-type: none"> <li>1. Computer/laptop, projector, and screen</li> <li>2. Flip chart/easel</li> <li>3. 2 Markers</li> <li>4. Ground rules</li> <li>5. Bike rack</li> <li>6. Strategic planning workbooks</li> <li>7. Humane Society flyer and goody bags</li> </ol>	<ol style="list-style-type: none"> <li>1. Arrange tables and chairs for small groups (i.e. 4-5 participants max).</li> <li>2. Post Ground Rules and Bike Rack.</li> <li>3. Queue flash drive resources (not vital to implementing the lesson).</li> <li>4. Write the following points from the lecture on flip chart, each on a separate page:               <ol style="list-style-type: none"> <li>a. 5 step approach</li> <li>b. Team Up approach (i.e. the story, the real story, etc.)</li> <li>c. Smarter Lunchrooms steps for change</li> </ol> </li> </ol>
Background and References	
<ol style="list-style-type: none"> <li>1. Strategic plan definitions: <a href="http://www.businessdictionary.com/definition/strategic-planning.html">http://www.businessdictionary.com/definition/strategic-planning.html</a></li> <li>2. <i>Team Up for School Nutrition Success Workbook</i></li> </ol>	

## OBJECTIVES

**Upon completion of this module, participants should:**

1. Identify one or more areas of opportunity for enhancing child nutrition programs in their school division.
2. Create SMART goals and objectives aimed at enhancing their child nutrition programs.
3. Develop a plan/strategy to attain goals and meet objectives.
4. Determine the resources necessary to attain goals and meet objectives.

# LESSON

Instruction	
<b>INTRO/ LECTURE</b>  <b>(25 MIN)</b>	<p>Welcome participants to the session and introduce yourself.</p> <p><b>Say:</b> Over the past two days, you have participated in training modules focused on five key areas of child nutrition programs: Farm to School, Nutrition Education and Physical Activity promotion, Menu Planning and Development, Culinary Skills, and Community Outreach and Engagement. As you made your way through each of these modules, you had opportunities to make note of areas of opportunity in one or more of these key areas as they relate to your programs. In today's session, we are going to create strategic plans from those opportunities. Before we develop strategic plans, we need to understand exactly what they are and how to go about creating, implementing, and evaluating such plans.</p> <p><b>Say:</b> Let us start by defining what a Strategic Plan is; one way a strategic plan may be defined is: <i>A plan used to communicate with the organization the organizations goals, the actions needed to achieve those goals and all of the other critical elements developed during the planning exercise. It can be a single page or fill up a binder, depending on the size and complexity.</i></p> <p>Another way it may be defined is: <i>A systematic process of envisioning a desired future, and translating this vision into broadly defined goals or objectives and a sequence of steps to achieve them.</i></p> <p><b>Say:</b> Now that we have defined what a strategic plan is, we can move on to how to create them. While there are a variety of frameworks and approaches used in strategic planning, a direct and simplified approach can be very effective.</p> <p>This is an example of a <b>5 step approach</b>:</p> <ol style="list-style-type: none"><li>1. Determine where you are (i.e. identify areas of opportunity; AKA needs assessment)</li><li>2. Identify where you want to be (i.e. goals and objectives)</li><li>3. Specify how you will get there (i.e. action plan)</li><li>4. Determine who and what you need to get there (i.e. resources)</li><li>5. Implement and evaluate at scheduled intervals; adjust as needed.</li></ol> <p>Regardless of whether a strategic plan is simple or complex, it will include these steps, even though the steps may be worded or described differently. Additionally, it is reasonable to span your plan over an extended period. Breaking down big ideas allows for more specific goals and strategies, as well as more clearly defined monitoring.</p> <p>Team Up for School Nutrition Success (ICN), Smarter Lunchrooms, and CDC's School Health Index are all viable resources to assist you in</p>

developing your strategic plan. Before we move forward to look at some of these tools, Is there anyone here who has done strategic planning that would like to share that experience.

**Ask:**

1. What was the reason/basis for your plan?
2. Who was involved in developing the plan?
3. How many goals and objectives did you have?
4. What obstacle, if any, did you come across?
5. What time frame did your plan cover?
6. How often did you review your progress?

**Say:** We will now look at resources you may use to develop and evaluate your strategic plans.

**ICN's Team Up for School Nutrition Success** workbook provides excellent tools for following the 5-step process we discussed. We have tailored these tools to focus on the five topic areas covered in this workshop.

Let's review how to utilize this tool for strategic planning.

1. Start with telling "**your story**" by identifying the current picture (**Stage 1**) the preferred picture (**Stage 2**) and the way forward (**Stage 3**).
  - a. **The Story:** Best practice areas identified as needing assistance
  - b. **The Real Story:** New perspectives gained
  - c. **The Right Story:** Key issues to work on
  - d. **Possibilities:** What you want the future to look like
  - e. **Goals/Outcomes:** Which solutions are best? Set some S.M.A.R.T. goals
  - f. **Possible Strategies:** Paths to your goal(s). Brainstorm strategies
  - g. **Best Fit Strategies:** Which strategies are best? Which strategies fit the resources available?
2. Using S.M.A.R.T. goals as the framework, you can develop action plans that will include the **person responsible, measure of success, target date, and date completed**. You will also note your **resources**.

**Say:** Another extremely useful assessment tool utilized in developing strategic plans for program improvement is the **Smarter Lunchrooms Scorecard**.

The **Smarter Lunchrooms Scorecard** contains 60 simple, no-cost or low-cost strategies used to assess and implement evidence-based

	<p>strategies in school lunchrooms and cafeterias. It is a helpful tool for assessing the current situation to identify areas of opportunity, as well as evaluating results. The Smarter Lunchroom’s <i>Steps for Change</i> process is as follows:</p> <ol style="list-style-type: none"> <li>1. It begins with making it a collaborative effort. Develop a team consisting of Food Service and School staff.</li> <li>2. Evaluate and identify areas in need of change.</li> <li>3. Develop an action plan.</li> <li>4. Identify resources (i.e., equipment, supplies, funding, and manpower needed).</li> <li>5. Implement change with a step-by-step process.</li> <li>6. Promote awareness for buy-in. Educate and involve students, families, and school staff.</li> <li>7. Monitor implementation (ongoing).</li> <li>8. Evaluate progress (i.e., surveys, data from consumption, participation, and purchasing).</li> </ol> <p>We should be aware that assessment and determination of our food service programs not be relegated to “food”. Other areas are essential to successful programs as well.</p> <p>The <b>CDC School Health Index</b> includes two indicators that we are hoping to improve over the course of the TNTG period and beyond. Those are <b>health education and physical environment</b>. The CDC School Health Index’s assessment and planning guide includes scorecards/checklists that may be used for these areas.</p> <p>As you work on your strategic plans, keep in mind that next year’s Team Nutrition trainings will target job-a-like groups (i.e. key staff members who are integral to implementing and evaluating your strategic plans).</p>
<b>Activity</b>	
<p><b>STRATEGIC PLANS</b>  (30 MIN)</p>	<p><b>Say:</b> Let us work through a plan together using the example provided (i.e. whole grain-rich pasta example).</p> <p><b>Say:</b> Now take the remaining time to create plans for your division using the same process. Although you have been provided with planning templates for each of the five topic areas covered in this workshop, you will determine the area or areas to work on based on your division’s need and resources. Feel free to bounce ideas off your peers. Your regional specialist is also here to assist you.</p>
<b>Closing</b>	
<p>(5 MIN)</p>	<p><b>Say:</b> Great job everyone! I hope you both enjoyed and found value in this activity.</p>

	<p>As you move forward with the development of your strategic plans, remember there are a variety of resources out there for you to utilize.</p> <p>Thank you for your participation today. I hope you have a clearer understanding of what strategic plans are, and how to create, implement, and evaluate them. If your programs are already excelling, consider how you can help take it to the next level. Improvement is a constant journey.</p>
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