

Defining strategies using the strategy profile

INTRODUCTION

Once you have laid the foundation, the first step in creating your delivery plan is to identify and define your priority strategies.

This exercise will lead you through the identification of potential strategies and the use of the strategy profile tool to define those strategies in greater detail. The level of detail necessary for defining a strategy will vary from system to system, based on need. We provide a general suggestion in the template on page 3, but you should feel free to target it as needed.

This process does not happen in a vacuum, and in fact, this exercise overlaps with several other exercises in the toolkit. If you find that too many strategies are identified in the first part of this exercise, use the 2x2 exercise guide also provided at www.deliveryinstitute.org/3A, which will lead you through an exercise of prioritizing strategies according to their potential impact and level of difficulty. We do suggest, however, that you complete the first part of the strategy profile (those questions shaded in grey in the template on page 3) before using the 2x2. It will be easier to prioritize strategies if all of the participants understand what the strategies are.

OBJECTIVES

- Identify priority strategies
- Define those strategies

MATERIALS NEEDED

- Markers
- Recreate the template on page 3 and post on the wall – multiple times if you will be defining multiple strategies. You can do this by printing a large version of page 3 and hanging that on the wall, or by recreating the template on a dry erase board, flip chart paper, EDI's signature "brown paper" or in a pinch projection of a computer screen. However you create this, it needs to be visible to the entire group and easy to change and add to.

TIME

- Exercise: 1-2 hours



INSTRUCTIONS

Time	Activity	Facilitator notes	Materials
15 minutes	<ul style="list-style-type: none"> (Optional): If you have not already identified strategies, brainstorm the major strategies that will have an impact on your goals Record the responses on flip chart paper, whiteboard, or other blank surface 	<ul style="list-style-type: none"> If strategies have already been identified, skip this step This should be a traditional brainstorm; don't let participants start critiquing or discussing one another's suggestions yet – just get all the ideas out 	<ul style="list-style-type: none"> Flip chart paper or whiteboard Markers
30 minutes	<p>For each identified strategy, complete the first six rows of the strategy profile template (those shaded in grey), identifying:</p> <ul style="list-style-type: none"> Description of the strategy What goal or goals it will impact Why we believe it will have an impact The scale Resources required Definition of success 	<ul style="list-style-type: none"> If possible, assign participants to different strategies; if the full group is working on one strategy at a time, you will need to block more time to complete this exercise Encourage participants to be as specific as possible in their descriptions and answers to each portion of the strategy profile 	<ul style="list-style-type: none"> Template Markers
45 minutes	<p>(Optional): If the strategies need to be prioritized, uses that initial definition created in the previous step to prioritize them using the 2x2 exercise guide</p>	<p>See "Prioritizing strategies using a 2x2 matrix" at www.deliveryinstitute.org/3A for more information</p>	
30 minutes	<p>For those strategies that are determined to be priorities, complete the rest of the strategy profile template to further define the details of the strategy, identifying (those that are not shaded):</p> <ul style="list-style-type: none"> Milestones Leadership 	<ul style="list-style-type: none"> If possible, assign participants to different strategies; if the full group is working on one strategy at a time, you will need to block more time to complete this exercise Encourage participants to be as specific as possible in their descriptions and answers to each portion of the strategy profile 	<ul style="list-style-type: none"> Template Markers
N/A	<p>Draw a delivery chain and estimate impact using a trajectory</p>	<p>To complete the delivery chain and impact sections of the strategy profile download the resources at www.deliveryinstitute.org/3B and www.deliveryinstitute.org/3C respectively.</p>	

TEMPLATE: STRATEGY PROFILE

Name of strategy	
Description: Describe the strategy in a sentence or two	
Goal(s): On which goal (or goals) will the strategy have a significant impact?	
Rationale: Why do we believe it will have an impact?	
Scale: At what scale (number of students, educators, etc.) will it be implemented?	
Resources required: What people, time, money, and technology will be needed to implement it?	
Definition of success: What would success look like for this specific strategy, and by when?	
Milestones: What are the most important milestones between now and then?	
Leadership: Who is the single person responsible for making sure implementation happens?	
Delivery chain: Who will that person work through to reach the field at scale? What are the risks, and how will we manage them? What feedback loop can we set up to track progress? (See Element 3B)	
Impact: What is the estimated impact of this strategy on the goal over time? (See Element 3C)	