

Staging Strategic Planning Retreats

By Bonni Carson DiMatteo

Retreats are generally thought of as a way to use focused energy in an uninterrupted format to achieve large-scale results. When they work well, they can create passion, process and performance for the non-profit organization. Garnering the excitement of the participants and focusing them on the future possibilities can generate a sense of commitment and renewal.

A well-run retreat can also break down the walls that can grow between divergent interest groups, within the Board or sometimes between Board and Staff.

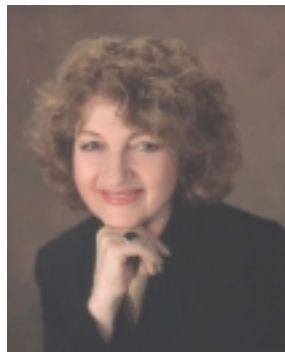
If you are the facilitator for a retreat, your job begins well before the group arrives at the site. Retreats are most effective if they are considered a *process* in a continuum, not an event, and you want the process to evoke passion as well as a product. To accomplish that, consider the retreat in three stages: pre-retreat planning, the retreat itself, and post retreat follow-up.

Stage 1 Pre-retreat

During this stage, the key activities include:

- Identifying the ideal result, the way you will measure success
- Choosing the right participants for the results you want. To get the best outcomes, we recommend that you include not only board, but key staff representation and clients or customers who can bring the voice of the market.
- Preparing them for the retreat with a pre-meeting that identifies the ideal result, their roles, and the upfront work prior to the retreat
- Choosing a site that is conducive to the result you want
- Working with the leader to create an agenda and asking for feedback on it, prior to the retreat.
- Scheduling phone interviews for each member to

“Retreats are ...a way to use focused energy in an uninterrupted format.”



establish their hopes, concerns and priorities. This gives the facilitator opportunity to break the ice prior to the meeting with everyone and can help mitigate some of the resistance.

- Identify what major changes have occurred in the last 6-18 months in staff, events that might impact future direction.
- Assigning up front homework that prepares them for the process. This includes each person's perspective on the strategic analysis of strengths, weaknesses, opportunities and threats (SWOT), vision, values, mission and top goals of the non profit

During this time the facilitator should be working closely with the Board Chairperson to clarify the above issues. Since many non-profit board members come

from diverse geographic locations it is best to determine whether they want to do a two day event or two separate one day events with some action plans in-between. Up front preparation on perspectives, ideal results, SWOT, mission, values, vision, can be valuable

time savers when you get to the retreat. As an icebreaker I often have people read their vision, which I frame in a “press release” for a point in time several years out that is part of

their homework.

Stage 2: Retreat

Key items to focus on during the retreat include:

- Have an agenda that is balanced in large group, small group, work and fun activities and paced with people's energy
- Clarify the results expected, and drive for their completion.
- Have a list of action steps to follow up after the retreat

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Strategic Planning Retreats, continued

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We suggest a tight agenda that allots time for each of the key issues to be decided, Vision, Mission, Values, Critical Success Indicator's, Strategic Direction, Goal Priorities, SWOT and its impact on goals. Our typical agenda for a two day retreat might look something like the one attached as Figure 1.

You will note that there is a specific amount of time that is devoted to communication skills, team-building and action planning. This is the process part of the retreat that can quickly undo the content part of the retreat unless it is addressed. Moving between large group and small group activities can reduce tension, ensure everyone has adequate "air time," and assign authority for creating goals and for wordsmithing the vision, values, mission.

"The retreat begins the process that creates the roadmap."

Stage 3: Post Retreat

Make sure the following are attended to after the retreat is over:

- Meet to follow-up on action plan.
- A call to action: creating buy-in and implementation of the plan
- Coach members to communicate the achievements, goals and progress of the plan.
- Schedule planned meetings to make accountable the plans and action items

Strategic Plans are only documents on the wall unless there is a preplanned implementation process with staff/board team and quarterly milestone meetings to assess how much they are on target with fundraising, staff issues, publicity, whatever are the key goals for the next 1-3 years.

Summary

Retreats are a great way to jump start a significant process. Like so many things, the two biggest keys to success are planning and communication. As Lewis Carol so aptly noted "If you don't know where you are going any road will get you there."

It's also important to note that strategic planning is a process not an event. The retreat begins the process that creates the roadmap. The people who drive it have to be accountable to the process. Planned meetings to address that accountability and to reinforce the passion will create success.

As facilitator you have the ability to enable the passion, process and performance for the strategic planning retreat to evoke new passion, commitment, and responsibility for creating the direction for the non profit into the next stage of growth. ☘

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See Bonni's agenda for a two-day Strategic Planning Retreat Agenda on the next page.



Strategic Planning Retreats, continued

Strategic Planning Retreat Agenda

Sidebar: Strategic Planning Retreat Agenda

DAY I

<u>Topic</u>	<u>Person Responsible</u>	<u>Time Allotted</u>
Overview of Retreat and Anticipated Results	Chair/Facilitator	20 minutes
Ground Rules	Facilitator	20 minutes
Communication Exercises	Facilitator	45 minutes
Lunch		60 minutes
<i>(Who are we?)</i>		90 minutes
What is our mission?	Facilitator	
What is our business?		
Where is the Market?		
Who is our competition?		
How can we differentiate from the competition?		
What are our values?		
<i>(Where are we?)</i>		
Non Profit SWOT		60 minutes
<i>(Where do we want to go?)</i>	Facilitator	120 minutes
Future Vision		
Agreement of Vision		

Day 2

<u>Topic</u>	<u>Person Responsible</u>	<u>Time Allotted</u>
Review Communication Skills/ Ground Rules	Facilitator	20 minutes
<i>(How will we know we got there?)</i>	Facilitator	60 minutes
Critical Success Indicators		
<i>(How will we get there?)</i>		
Creating SMART Goals and Strategies		90 minutes
Lunch		60 minutes
Large Group/ Small Group	Facilitator	90 minutes
Presentation/ Discussion and Agreement of Goals		90 minutes
Team Activity	Facilitator	60 minutes
Action Plan	Facilitator	60 minutes

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