

How to Facilitate a Strategic Planning Retreat

By Phil Hardwick

Strategic planning is “...the process of determining what an organization intends to be in the future and how it will get there. It is finding the best future for your organization and the best path to reach that destination.”

- Strategic Planning Workbook for Nonprofit Organizations,
Amherst H. Wilder Foundation



A strategic planning *retreat* is a meeting as described above that is away and apart from the day-to-day routine of the participants. In my consulting practice I facilitate retreats primarily for chambers of commerce, economic development organizations and nonprofit associations. I have also facilitated retreats and forums for for-profit companies, government agencies, cities/towns and educational institutions. I have been doing so for over 20 years. In this publication I will walk you through one of my typical one-day strategic planning retreats for a board of directors of an organization. My purpose is so that you too will be able to facilitate a retreat for your organization.

Prior to the retreat it is important for the facilitator and the representative(s) of the organization to meet and decide on what should be accomplished at the retreat. For many organizations it is simply to develop the plan of work for the coming year. For others it might be to seriously consider the mission and purpose of the organization and chart a new course. Still others might use the retreat for developing a budget.

The four basic steps in a strategic planning retreat are:

- Situational Analysis (where we are now; how we got here)
- Visioning (where we want to go)
- Goal Setting (how we will get there)
- Implementation (who will be responsible and accountable)

Before dealing with those steps it is important to give an overview of the process, what is expected of the participants and what will be the outcome of the retreat. There should then be some type of introductory exercise for participants to get to know each other. There are dozens of ways to do this. How you do so will depend on the group and the

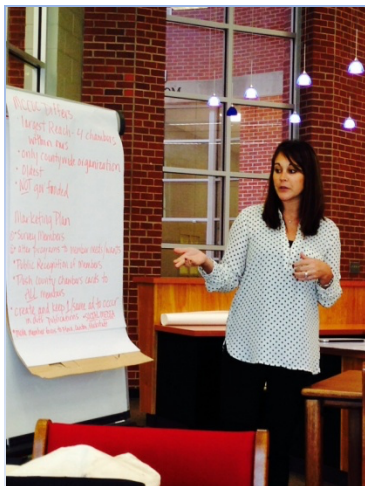
setting. For example, the board of directors of a bank and the community advisory board of a school district have different needs when it comes to getting to know each other. I often pair the participants and request them to interview their partner and then introduce him or her to the group. I provide specific questions to be asked. Typically, participants are asked to discover answers to the following questions:

1. Name and affiliation
2. If you could be anywhere else in the world today, where would you want to be?
3. What is something you would like changed in your community?
4. If they were to write a book about your life, what would be the title?
5. If you could have dinner tonight with an historical figure, who would it be?
6. What is something about you that no one here knows?

These type questions offer wide latitude for responses and allow others to discover common interests. They also provide an insight into the tone of the retreat.

Situational Analysis

This part of the retreat is about discussing the current performance of the organization. I'll often begin by asking participants to think of the first word that comes to mind when they hear the name of the organization. The responses are written on a poster or newsprint at the front of the room as the words are called out.



Many facilitators, including yours truly, sometimes use the classic SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis. Four breakout groups are formed and each group is asked to make a list of one of the items. For example, one group is asked to list the top three strengths of the organization, and so on. A time limit is given. At the end of the time limit a representative of the group reports for the group. The responses are recorded or are listed on newsprint/poster paper by the group. The groups should be told that strengths and weaknesses are internal to the organization while opportunities and threats are external. A variation that I often use is to ask the groups to make a list of “Things we do well” and “Things we could do better.”

Visioning

During this session the participants are asked to ahead to a particular point in time, specifically to the point that the retreat is addressing. For example, a plan of work may be only for one year, while a new board of directors might be thinking about where the organization will be three years from now. These days it is difficult for many

organizations to plan more than three years ahead because the environment seems to change so rapidly. On the other hand, a 10-year plan is not unheard, ergo the German soccer team's 10-year strategic plan to win the World Cup.

The most common exercise I employ for visioning is to pass out 3 x 5 index cards and ask participants to complete the sentence, "I'll be proud of our organization in three years if ... " The cards are then collected and read aloud, during which time participants are requested to listen for recurring themes. This sets the stage for the next session of breakout groups, each of which will deal with a particular theme. For example, if one of the themes related to better communication about the activities of the organization then the breakout group would be asked to propose goals related to communication.

Goal Setting

Setting goals is the primary reason for most strategic planning retreats. It is not an easy task, but one that is critical. SMART is an acronym often used to describe the characteristics of a goal. The letters stand for Specific, Measurable, Attainable, Realistic, Time-bound. When the breakout groups presents their proposed goals it is useful for the entire group to determine that the goals are SMART. Here is an example of two goals recently adopted by a state education agency:

- All students are proficient and show growth in all assessed areas
- Every student graduates high school and is ready for college and career

Are they SMART? The goals appear to be specific, measurable and time-bound. One would question, however, if it is realistic to think that five years from now EVERY student in the state will graduate from high school? Is that an attainable goal?

After the goals have been selected it is time to prioritize them. A common way to do that is to pass out stickers of different colors and ask participants to "vote" on the goals. For example, let's say that you have three different colors (red, blue and green) of stickers. Pass out one sticker of each color so that participants have three stickers. Ask them to place a red sticker by the most important goal, a blue sticker beside the second most important and the green sticker by the third most important. After all participants have done that, then score the goals by giving three points to each red sticker, two points to each blue sticker and one point to each green sticker. Tally the numbers to see which goal received the most votes.

Implementation

Now for the hard part. Who will be responsible for achieving the goals? One method I occasionally use is to pass out red pens and ask participants to sign their names by the goal that they will be personally responsible for achieving. Alternatively, I might ask participants to sign

their names by the goal of which they will be “the champion.” This method works well for small organizations that have personally involved and active boards. Otherwise, it may be necessary to form committees or delegate to staff or someone else.

Remember: The reasons that goals are not achieved are (1) because the environment changes or (2) no one is personally accountable or responsible.

Finally, a date should be set for a follow-up meeting to have reports on how the goals are coming along.

I hope this much abbreviated version of HOW TO FACILITATE A STRATEGIC PLANNING RETREAT will be beneficial to you and your organization.

Happy retreating!

Phil Hardwick

www.philhardwick.com

phil@philhardwick.com