



Strategic Planning Retreat Facilitation

Strategic planning is an organization's process of defining its strategy, or direction, for the next 3-5 years, and making decisions on how it will allocate its resources to pursue this chosen strategy. In other words, strategic planning asks and answers the following questions: "Where are we now?", "Where do we want to go?", and "How will we do it?" Each organization varies in how it does strategic planning, but it generally takes 6 months to 1 year to complete the process.

Strategic Planning Retreat Objectives

Establish Retreat objectives – The outcome should be agreement from Board/Steering Committee about the desired direction for the next 3-5 years.

Possible questions to answer:

- Audience: Define who we serve and if we want to expand our audience within the next 3 years
- Methods: Define where we provide our programs, and if we expand how we provide services
- Impact: Define the outcomes we hope to achieve - how should we position ourselves in the field with respect to a) what kinds of services we provide; as well as b) our leadership role in Chicago-area and national organizations.

Capacity to successfully complete the strategic plan: What infrastructure capacity do we need to successfully meet our 3-5 year goals?

Agenda suggestions

Welcome/Introductions/Retreat Overview – What kind of introductory activity? Do we want to use the time for team building? Laying the format for the day itself will take 15 minutes. Usually an intro/team building activity will take 30 minutes. Assume that the first hour is in getting the group ready for deeper discussion. One method to get people to the meeting on time is to serve a light breakfast 30 minutes prior to the start of the retreat. Welcome section is a place for Board/Steering Committee Chair and Executive Director/Staff to make introductory remarks. The retreat facilitator provides an overview of agenda, materials, etc. as well as the facilitates the introductory activity.

Mission/Vision/Values – Review and affirm. Usually takes 30-45 minutes, depending on if the language is being significantly changed or not. Could take more time.

Summarize information gathered – Decide how much detail to provide for pre-work and at retreat. What is best presentation format for pre-work and at the retreat? Given the amount of information, it will be helpful to have more than one person present it. Who should present what piece?



Agenda suggestions, (con't)

SWOT (strengths, weakness, opportunities, threats/challenges) analysis – Retreat facilitator walks the group through this analysis. Usually takes 1 hour, and allows the group to give their own feedback, after digesting the information that was gathered prior to the retreat. Key question to ask for this section: Does the Board/Steering Committee want to assess itself at this retreat, and its own capacity to move the strategic plan forward?

Setting priorities – Retreat facilitator provides the structure and handles this conversation. This is the heart of the retreat, as it will form the basis of the strategic plan. Often this starts with individual writing before doing large group and small group discussion. Also entails voting with sticky dots. Best format depends on the needs of the group.

Retreat evaluation – The retreat facilitator uses a variety of formats to gather evaluation information. One technique is a verbal format called “Snap/Seed”. Each person goes around one at time, and gives one positive comment about the day (snap), and one suggestion for future board work (seed). Groups may also be given a written form to fill out, or will be sent an e-survey one or two days post-retreat.

Retreat Planning

The retreat facilitator works with assigned Board/Staff leadership to set the retreat objectives and agenda, as well as discuss pre-retreat communication with participants. Retreat logistics regarding space, materials, etc. are also finalized.



Costs

McAlpine Consulting for Growth determines the costs for retreat facilitation based on the requested services, which may include:

- Planning and Coordination
- Logistics
- Material Development
- Facilitation
- Notetaking
- Report writing

Specific hourly consulting rates vary depending on consulting services. Please contact Laura McAlpine, Principal, McAlpine Consulting for Growth for further information.



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