

# ANYTOWN CHAMBER / XYZ ASSOCIATION

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*Strategic Planning Retreat*

*Day, Date, Year*

*Time*

*Location*

## **A G E N D A**

### **Welcome and Introduction**

*Board Chair, 30 minutes*

*Overview of the day – Larry Dowell*

*Update from President/Executive Director – Chamber President/ED*

*Self-introductions/Icebreaker – Larry Dowell*

### **Setting the Tone for the Day (Rapid Fire Questions via iClicker and Flip Charts)**

*Larry Dowell, 15 minutes*

*What is one thing you would do to improve the Chamber?*

*The Chamber should be more active in engaging residents into the local business community.*

*How many programs/events should Board members be required to attend over the course of a year?*

*The size of the Board should be...*

*The current website is an effective communications tool.*

*The Chamber should identify/explore/pursue/develop local media partners.*

*The Chamber should advocate on behalf of certain policies at the city level (i.e. sign ordinances or licensing)*

*The Chamber should create more non-dues/non-event revenue streams.*

*We are keeping pace with technology.*

*Our visibility in the marketplace has improved over the past five years.*

*The Chamber is the go-to resource for businesses in our area.*

*Our greatest strength/weakness/opportunity/threat is...*

*Our current mission statement applies to current operations.*

*Our current vision statement accurately portrays what we are aiming for.*

### **How to Think Strategically**

*Larry Dowell, 15-30 minutes*

### **Discovery Review**

*Larry Dowell, 60 minutes*

*Membership satisfaction survey*

*Board of Directors survey*

*Information from interviews/focus groups/staff focus group\**

*Competitor brief\**

*Best practices review\**

## **Board Education**

*Larry Dowell, 30-60 minutes*

*Industry trends  
Board roles and responsibilities  
What your fellow Board members expect from you  
Policy governance overview  
Leadership and opportunities – creating the team*

## **SWOT Analysis\*\***

*Small groups, 30-60 minutes*

## **Mission and Vision Check-in**

*Larry Dowell, 60 minutes*

*Are we living our mission?  
Developing a mission statement  
Value statements\*\**

## **Developing the Strategic Direction & Strategic Planning for the Next Three Years**

*Larry Dowell, 60-90 minutes*

*Potential areas of focus for the strategic goals:*

*Advocacy and public policy  
Membership, retention and growth  
Programs and services  
Organizational excellence  
Community promotion  
Board development  
Communications and branding*

## **Develop Strategies and Tactics for Each Strategic Goal**

*Small Groups, 30 minutes*

## **Discussion of Strategies and Tactics**

*Large Group, 45-60 minutes*

## **Next Steps**

*Larry Dowell, 15-30 minutes*

*Elements of a rolling three-year plan  
How to measure success  
Q&A*

## **Adjourn**