

Ground Rules at the Strategic Planning Retreat *Tips from Class Section 3-1 at the Midwest Institute*

A required course at the US Chamber's Institute for Organization Management is Strategic Planning. The purpose of the course is to ensure that chamber and association professionals understand the process and implementation.

Midwest Institute Class 3-1 was asked, "What *ground rules* are important at the outset to help volunteers understand the strategic planning process?" Here is the list:

Sacred Cows Make the Best Hamburgers - There is little benefit to protecting the organization's sacred cows when discussions should be open and honest. A sacred cow is a committee or person immune from criticism for some reason. For example, "Our PR Committee doesn't do anything but we cannot eliminate it."



I went to strategic planning,
and all I got was this lousy T shirt !

There's an Elephant in the Room - To encourage frank, open discussions it is sometimes necessary to include topics that are important yet ignored because of embarrassment or culture. Nobody should feel uncomfortable discussing the elephant in the room.

Collecting Dust - The intent is to create a comprehensive plan to guide the organization over several years. It should not be shelved and forgotten after the retreat.

History has its Time and Place - History doesn't have much use in the planning process. Recalling the good-old-days wastes times and distracts from future oriented perspectives.

Respect for People and Ideas - The retreat is different from more formal board meetings. Encourage creative ideas and diverse opinions to develop the plan.

Go for Altitude - Strategic thinking improves at 50,000-feet. For instance, "we should be the global resource for an emerging profession," is higher and broader than, "we need more classes at the convention." Promote soaring like an eagle and staying out of the "weeds" and "treetops."

Supplies - Bring what you need, including unscented, wide colored markers, masking or painters tape, self-adhesive flipcharts, Post-It notes, notepads, pens, etc. Don't forget information such as the budget, member surveys and the prior plan.

Games Belong on the Playground - Retreats have a bad rap from games, group hugs, exhausting mission statement rewrites and ad nauseam discussions of strengths, weaknesses, opportunities and threats (SWOT). Provide an agenda of what must be accomplished. Leave the games on the playground and group hugs to the therapists.

Smarter than a 5th Grader? - Check the clarity of the mission statement by reading it to a 5th grader and asking what they think it means.

Caffeine – A supply of coffee and chocolate ensures the board maintains a buzz.

Terminology - Planning terms are unique among professions. One industry may set “goals” while another labels them “priorities and aims.” Agree upon the terms so volunteers are not left wondering what's being discussed.



Lock-Down - Got volunteers who can come for the 2nd part of the day or must leave before the plan is complete? Consider “lock-down.” The whole team must be able to start and finish the plan. Directors dropping in at their convenience, expecting a briefing to catch them up, are distractions.

Digital Distractions - Limit messaging and calls to frequent breaks.

Plan Reviews - Plan a meeting of executive officers and staff every six months to review progress. Annually the full board should review the plan; expecting to update it about every three years.

Align Committees and Budget - The plan impacts the committees, budget and even agendas. Keep the committees that will advance the goals. Fine-tune the budget based on new goals. Consider organizing board meeting agendas with the strategic plan goals.

Ground rules help volunteers understand expectations at the strategic planning retreat.

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Note: Midwest Institute Class 3-1 contributed to the *ground rules*. Thank you for the great input and discussions. The perspectives herein are not those of Institute and simply represent practices in strategic planning. Bob Harris, CAE, can be contacted at bob@rchcae.com or www.nonprofitcenter.com.