

Strategic Planning Retreat

Agenda of Questions

Introduction:

The ground rules during these days together include:

1. Everyone should feel safe.
2. There are no generals and privates at this retreat. Everyone shares as a genuine equal. Titles and positions are left at the door.
3. We want to chase elephants, not rabbits. Anyone has the right to challenge the group if s/he feels the group is chasing rabbits. The group must then stop and vote without debate whether to continue that discussion.
4. We want to keep the focus on our mission, not on private turf. Threatened people seldom make good decisions. We are in this together. To the degree possible, personal feeling should not impede the free exchange of information and opinion.

I. WHERE ARE WE NOW?

- A. The World We Face: The broad environmental analysis. (Assigned topic for group member)

What is going on in the world today

politically?

socially?

economically?

demographically?

culturally?

educationally?

Will tomorrow's environment be different still?

Can you give relevant statistics and information from media and other sources?

- B. The World of _____ (Assigned topic from group member)

What is happening in other like industries?

What can we learn from their strengths and weaknesses?

Who are the competitors in the field? What do we need to know about them?

- C. Who Are We and Why Are We Here? Internal analysis
SWOT sheet (strengths, weaknesses, opportunities, threats)

- D. What Do We Value?

What values have guided us to this present time?

Do we still hold these values?

II. WHY DO WE EXIST?

FOCUS QUESTION: *What is our mission?*

Questions to help write a mission statement. Answer each of the questions in seven words or less.

1. What are we?
2. What do we do?
3. Who are our customers?
4. What is the benefit to our members?
5. What makes us unique?

If you have a mission statement, affirm that statement.

III. WHERE DO WE WANT TO BE? Our Vision for the Strategic Plan

Key questions:

What is our vision for the future?

What should be our focus for the coming years?

What vision do we have for our organization in the next five years?

Examples: Put a man on the moon and bring him back by the end of the decade.

Criteria:

They are visionary--not process (i.e. The revolutionary assembly line was a process--not a vision. Henry Ford's vision was to put a car in every garage. He developed the assembly line as a way to accomplish his vision).

They are measurable

Focus Question: Brainstorming exercise: *What is your vision in the next year (two years)? Think visionary--not process.*

IV. THE GAP: HOW DO WE FILL THE GAP FROM WHERE WE ARE AND WHERE WE WANT TO BE?

Focus Questions:

How wide is the gap between where we are and where we want to be?

How do we measure that gap?

What barriers keep us from reaching our vision?

How can we bridge those barriers?

What steps can we take to fill the gap?

Step One: Critical Success Factors

Think of the goals to accomplish this mission

Not the how, but the what (statements of hope)

Necessary and sufficient rule

Each is necessary and all are sufficient

All must have "We must" or "We need"
No less than 4, or more than eight
Each should address a single issue (avoid the word "and")
All must have a consensus -- all must agree on what is vital to this mission

Examples:

We must have an aggressive marketing program.
We must raise \$1 million.
We must participate in policy and legislation
We must increase public awareness of
We must develop public and public partnerships

Step Two: Business Processes to achieve these goals

FOCUS QUESTIONS: What would it take to achieve these goals? What are the business processes that we need to achieve each Critical Success Factor (goal)?

What plans do we have to make?
What people-resources do we need?
What financial resources do we need?
Are any new structures necessary? If so, what are they?

For each critical success factor:

Each business process should follow a verb-plus description.
Each should have an owner, the person responsible for carrying out the strategy.
The owner should be a member of the board present at the meeting.
All should begin with the words, "we must"
No owner should have more than three or four strategies
Each should address a single issue
All must have consensus—all agree on what is vital to the mission

Example: Develop an interactive web site (Doug by January 1, 2006)

IV. WRAP-UP

Given who we are and what we represent, what could we do to establish this mission and attain these goals? Where do we go from here?