Wrong People at the Planning Retreat
Bob Harris, CAE

Association planning retreats are convened every few years. They represent a significant investment in people’s time and meeting costs.

Attendees are asked to create a 3 to 5-year roadmap. The results should best position the organization and communicate value to members.

During the process, volunteers and staff will take deep dives into analyzing trends, assessing programs, creating initiatives and making long-term decisions.

Preferred Qualities

Desired qualities of retreat attendees include INNOVATION and STRATEGY.

**Innovators** – These people are good at transforming problems into opportunities. As a team they make use of resources to deliver value. They probably have comfort with technology applications. They appear optimistic. Be leery of the attendee who starts with, “I don’t know how to say this, but we have a problem.”

**Strategists** – People who are strategic can think beyond their term of office. They are visionaries, aware of external threats and opportunities. They are a sounding board for market trends, able to position the organization for success in the long term. The opposite is a tactical thinker who might ask about meals at next year’s convention, delving into committee and staff work. Tactical thinkers get stuck “in the weeds.”

The Wrong People

Be mindful about who is invited to the retreat. Some groups believe they must include the entire board, even the directors who are not strategic nor visionary. This approach will negatively impact results.

For persons who are not invited, gather their input through advance focus groups and surveys. Convene caucuses to receive group input.

**Emerging Leaders** – A plan addresses the future. Don’t forget to include upcoming leaders and student representatives.
Size Matters – An IRS guide suggests board size should allow for meaningful conversations. The average size in the USA is 15, an ideal number for engaging everyone at the table. If you have more attendees, the time must be extended to allow everyone to speak. Add an hour for every 4 people over 16 at the meeting. Too large and you’ll find attendees making calls outside the room or answering e-mails under the table. If microphones are needed the process loses its organic nature.

Aggravated – There are some who feel their attendance is an imposition or they have better things to do. Unfairly, they want to arrive late or depart early. Possibly they dislike the current elected president, so they won’t say a word, or play devil’s advocate all day. You might recognize the smirk on their face.

Designated Representatives – Some people are invited to represent a special interest. For example, the director assigned to Global Relations. The big surprise is when these people add nothing to the plan about what they were invited to represent.

Authentic Leaders – The planning team should be authentic, dedicated volunteers who understand their responsibilities. Some boards are quick to say, “Our staff does that for us.” There must be a partnership between board and staff.

Mums the Word – A common approach of new directors is, “I won’t say anything the first six months.” If attendees are shy, won’t speak up, acquiesce to others, they are not the best persons for planning. Include directors able to voice confidence and offer solutions.

Staff – The senior staff should be included. They can offer data and ideas to support knowledge-based decisions. Suggest to staff, “during strategic planning, yield to the board and then offer your knowledge.” At times staff may have to “bite their tongue” listening to board perspectives.

Past Presidents – Past presidents are great to include so long as they are innovative and strategic. Balance the number of seasoned leaders with future leaders. You don’t want past presidents to crush the process with statements like, “That’s not how we used to do it.”

Components – Representatives of chapters are often included. If they come from a chapter that is barely surviving, these reps may not be the right people. You want leaders who come from successful chapters, in other words, they have their own house in order before advising the parent organization.

Ex-Officio Directors – Some boards include ex-officio members representing other interests, for example a university or the office of the mayor. Consider how they might sway outcomes. If they are not included, ask for their advance input.
Empty Chair – Planners represent the interests of the membership, not their personal interests. To make the point, keep an empty seat at the table with a name tentcard, “MEMBERS.” Frequently ask, “what would the members think?”

Nutrition

The planning group must be fueled. Food and beverage impact the process, remembering, “You can’t work on an empty stomach.”

Offer protein if serving breakfast; who doesn’t like bacon? If the group started early, let lunch be a welcomed break by 11:30.

A heavy lunch will leave the group in a food-coma. Offer light salads and deli sandwiches rather than a menu of lasagna, beef and potatoes. Only once did a group drink so heavily the first night that their hangovers impeded the process.

Discourage guests and spouses at lunch if you want the group to continue their strategic discussions. Use the lunch to assign table topics for problem solving, or simply give them a break.

Make energy-swag bags. Fill them with protein bars, fruit and chocolate to keep planning invigorated. Provide plenty of caffeine and water.

In strategic planning, who you invite, the number of people, and what you feed them, will impact outcomes.

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Note: Bob Harris, CAE, provides free governance tips and tools at www.nonprofitcenter.com.